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75th Anniversary

MILESTONES IN TRUCKING

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FLEET REFERENCE ISSUE

Following an introductory article on the status of efforts by trucking associations and other organizations to establish uniformity in states' tax and registration laws, in the Fleet Reference Annual edition in April, CCJ will offer updated information on reciprocity, sizes and weights, fuel taxes, a guide to federal regulatory agencies and a directory of fleet associations. Also featured in the April edition will be the Shop Equipment Buyer's Guide.

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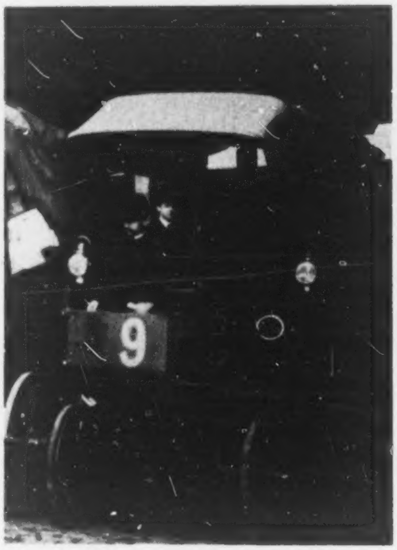

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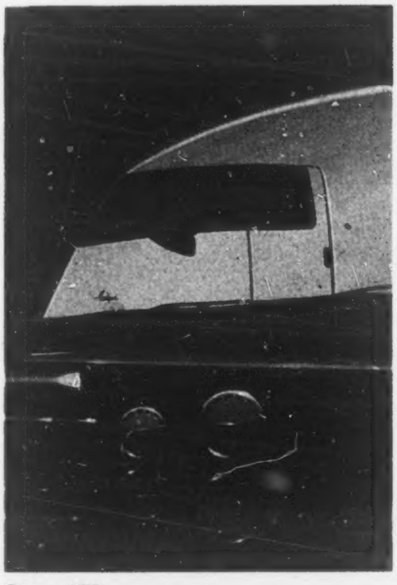

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75th ANNIVERSARY ISSUE

The special anniversary section of this edition is comprised of four major parts:

Milestones In Trucking: Covers the first trucks; development of truck technology and highways; the need to regulate and deregulate; early fleets; industry associations and suppliers. 103

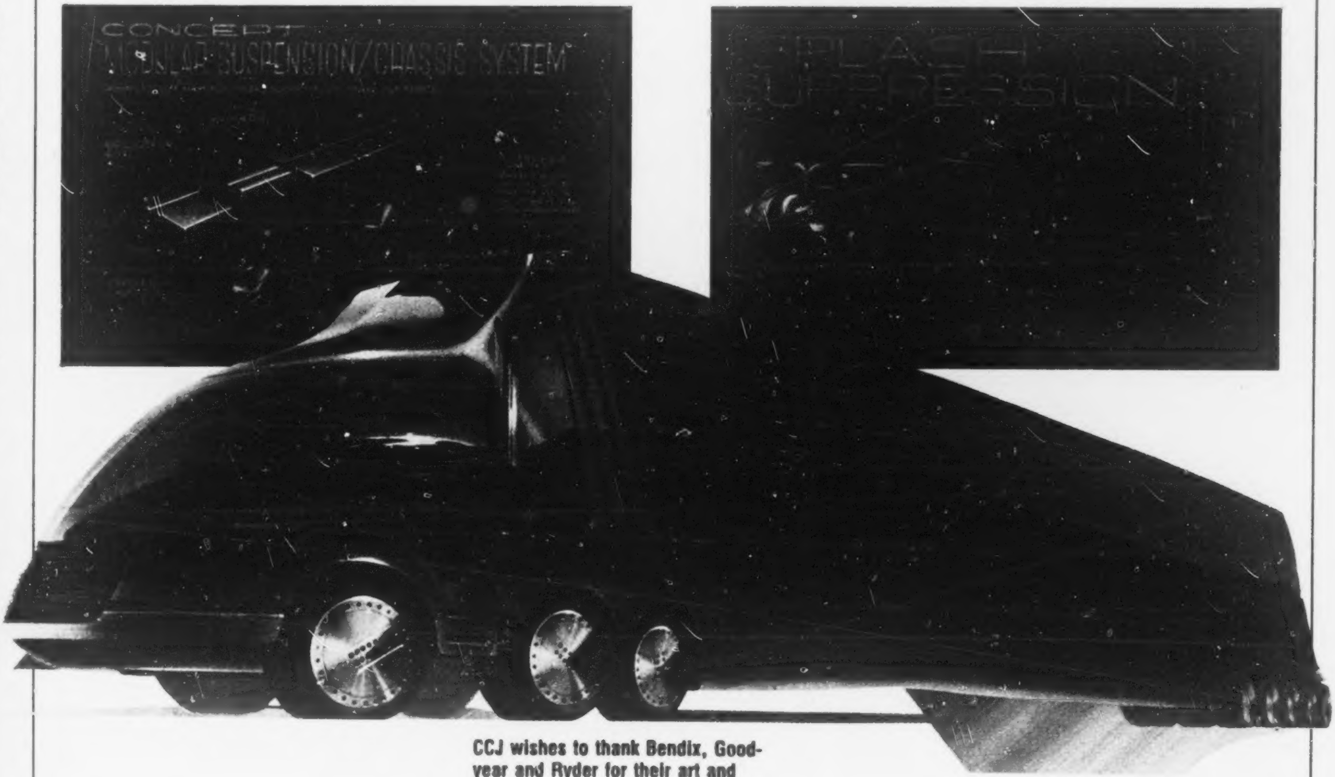
The Coming Of The Brotherhood: A review of the Teamsters' development into an institutional part of trucking, organized crime's influence on the union, and the recent decline of the brotherhood. . . 129

The Supplier Scrapbook: A celebration of industry suppliers and a sampling of their early advertisements. 137

Into The 21st Century: The rose of trucking is just beginning to bloom and will continue to flower if investments in people and technology are made. 155

Into The 21st Century

Don't become so infatuated with identifying and controlling costs, that you forget to invest in the future. That's a concern expressed by many of those interviewed by CCJ editors for this special section. It is a thought fleet operators should keep in mind during these times, when pressures of day-today business competition can easily overwhelm the need to anticipate and develop strategies for success in what most believe will be a much tougher trucking business tomorrow. In this section, our editors have attempted to construct a realistic image of what the trucking business will be like in the foreseeable future. The information reported is a compilation of interviews with industry analysts and many of the best minds in the fleet and supplier sides of the trucking industry today.



CCJ wishes to thank Bendix, Goodyear and Ryder for their art and photo contributions to this section.

Getting Better Control Of The Vehicle And Costs

"There is an applied technology wave sweeping over this industry," says Bill Tracy, technical director of The Maintenance Council of the American Trucking Associations, Inc. He should know, for he is one of the driving forces behind a joint industry effort to ensure that tomorrow's trucks will offer the advantages users need.

Rather than present a broad-ranging report on the many areas where technology is being developed to make trucks more efficient and productive, our editors chose to focus on two areas where fleet operators will experience the greatest impact the soonest, and where many believe the greatest benefit, from safety and efficiency standpoints, is likely to be the result: brake systems and electronics.

Air Brakes: The Pressure Is On

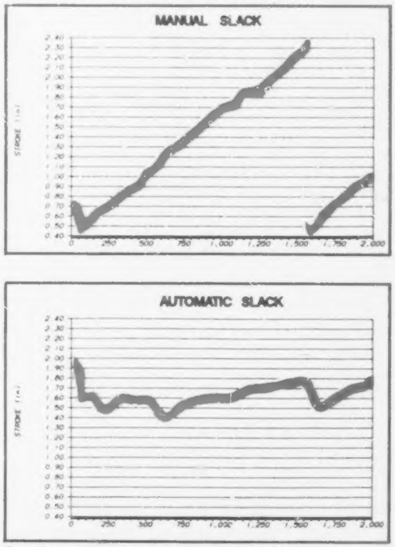
The pressure is on to improve braking on tomorrow's trucks. That's because modern brakes are being called on to provide more retardation force than in years past, sometimes twice as much.

Ironically, the advances making modern trucks more efficient to operate, and tomorrow's trucks better still, are taxing brake systems to their design and maintenance limits.

Vehicle rolling resistance, engine braking and aerodynamics all play a part in creating drag that aids in the vehicle braking effort. Widespread increase in the use of radial tires, improved aerodynamics, better lubricants, plus decreased engine braking, mean that brake systems must absorb a greater amount of energy than ever before.

Need for better braking has attracted a lot of attention over the past few years, and rightly so. In 1984, brake system defects and misadjustments accounted for 63.2% of all out-of-service violations found during Bureau of Motor Carrier Safety roadside inspections.

A staggering amount of research and development work, covering all aspects of vehicle braking, is being conducted at the National Highway & Traffic Safety Administration; the federal Department of Transportation; the Bureau of Motor Carrier Safety; the Society of Automotive Engineers; the Truck/Trailer Brake Research Group, a joint-effort between the American Trucking Associations, the Canadian Trucking Association, the Motor Vehicle Manufacturers Association, the Truck Trailer Manufacturers Association and the Heavy Duty Manufacturers Association of the Motor and Equipment Manufacturers Association. This does not include product development and testing being done by virtually all OEMs and brake component suppliers.



Graphs generated on the Rockwell dynamometer show that, with a manual slack adjuster, chamber stroke varies from about $^1/_2$ in. to $2^1/_2$ in. between adjustments. With an automatic slack adjuster, stroke varies only from about 1 $^1/_2$ in. to 2 in., with no adjustment. The duty cycle (brake line pressure) was varied throughout the 2000 applications, according to vehicle service data gathered from the field.

While at this time it remains unclear exactly how typical brake systems will be made better, there is evidence that one or more of the following will play a major role in tomorrow's braking systems: automatic slack adjusters; long-stroke chambers; disc brakes; larger front brakes; and electronically controlled anti-lock systems.

Automatic slacks: Automatic slack adjusters will gain broader acceptance among fleet operators, many of whom were burned by bad products when they were introduced in the 1970s. Today, there remains a general concern—about reliability, durability, installation complications, an inherent tendency to overadjust on drum brakes and misinformation about each of these—which has slowed acceptance of ASAs and caused them to be blamed for many ills more honestly attributed to poor, or neglected, brake system maintenance.

Air disc brakes: Disc brakes have inherent advantages over drum brakes. The chief advantage is disc brakes provide more consistent braking torque through a wide range of temperatures and speeds. Another advantage is discs' ability to shed water.

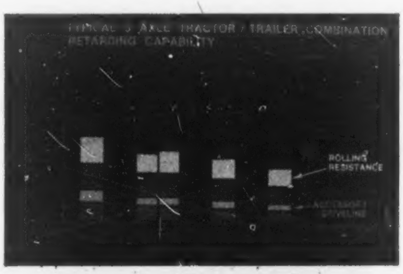
While many believe that discs will become the brake of the future, there are problems that first must be overcome. Discs have smaller friction surfaces and less lining area, per installation, than typical drum brakes. This means they must generate higher clamping force and dissipate more energy per square inch of lining. Thus, disc brake linings wear out faster in the same application alongside drum brakes, and heat-related failures like rotor cracking are problematic.

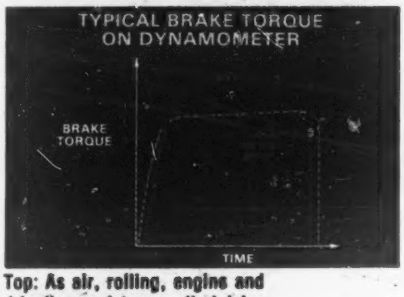
These problems can be solved by technology, although the question remains whether this technology can be made available at reasonable cost. The problem that most frustrates suppliers and would-be disc brake users is brake imbalance. Brake imbalance is not only a disc brake problem. It exists on drum braked equipment as well. Efforts to integrate disc brake-equipped vehicles into drum-equipped fleets can add unwanted complexity and aggravation to the balance equation. This is a major roadblock to the increasing use of disc brakes in the future, and finding a solution to the imbalance problem is given high priority on fleet equipment managers' and suppliers' agenda. Eventually, this will lead to a better understanding of brake system imbalance, which should ease the road a bit for disc brakes.

Front brakes: If optimum brake balance is to be achieved, the brakes on each axle must contribute braking force in an amount appropriate for the weight carried by that axle. Many believe that large front brakes will be necessary on future brake systems.

User resistance to front brakes, however, is strong. The major concern is loss of steering resulting from front wheel lockup in a slippery road emergency stop situation. Steering pull resulting from a side to side front-wheel brake imbalance, is a less volatile concern. Although these fears can be minimized or eliminated by, for instance, the use of disc brakes.

Long-stroke chambers: Another device that promises to improve brake systems of the future is referred to as the "long-stroke brake chamber." The effective, useful push-rod stroke of a standard type 30 chamber is approximately 2 in., after which the braking force produced at the chamber drops off sharply. A high-pressure brake application can use approximately $1^1/_2$ in., assuming the brake is properly adjusted. If this emergency application is prolonged until the brake assembly heats up and expands the drum, another $^1/_2$ in. of stroke may be required to maintain shoe-to-drum contact. A prolonged, high-pressure brake application like this, especially in a brake system with unadjusted brakes, may extend the chamber's stroke beyond 2 in., and into the range where chamber output force can't contribute much to the braking effort.





Top: As air, rolling, engine and driveline resistances diminish, brake systems are called on to do more work.
Above: Unlike a drum brake, a disc provides constant braking torque throughout an extended stop.

A brake chamber designed with an additional $^1/_2$ in. of effective push-rod stroke, while not a substitute for properly adjusted brakes, would provide an added margin of safety.

Anti-lock: As is the case with long-stroke chambers and front brakes, many industry sources believe that electronic anti-lock braking systems will reappear. While none would dare to speculate on whether the government will make anti-lock systems mandatory, they do say that, as other vehicle electronic systems begin to gain acceptance, anti-lock might become palatable on its own merits because today's systems are reportedly much improved over the failure-prone systems of the FMVSS-121 era.

Heavy-duty brakes are finally getting the attention they deserve. Manufacturers, at the behest of users, government and industry associations, are working to shorten stopping distances, while improving reliability, longevity and maintainability in tomorrow's systems. One thing about which everybody agrees is that future brake systems will be better balanced. For the user, that means safer and more reliable stopping.

Electronics: Computing Lower Costs

Advances in electronics promise that fleet operators soon will be able to dispatch driver and vehicle with greater control, and that means lower cost.

Computer-equipped trucks that

interact with drivers and contain a mind-boggling array of hi-tech electronics will evolve within 15 years, according to Warren Young, engineering vice president at Freightliner.

These trucks will bristle with sensors, monitoring everything from road conditions to brake linings, according to Mack Truck engineers. About 50 sensors, linked with a wide assortment of microprocessors and mechanical actuators, are expected to control:

- transmission shifts;
- all aspects of engine operation;
- anti-skid braking;
- variable-rate power steering;
- drive-axle traction;
- suspension stiffness.

Even the driver's seat, heating/air conditioning and dash instruments probably will be computerized, engineers say.

One significant innovation likely to appear on highway trucks is electronic traction control, says William Eddy, director of the Product Development Group at Allied's Automotive Technical Center in Troy, Mich.

By automatically braking individual sets of drive wheels to eliminate slippage, traction control permits single-axle tractors to handle fairly heavy loads "without sacrificing the pulling power associated with tandem-axle trucks," Eddy says. Traction control will permit substantial weight savings, resulting from use of lighter drive lines and suspensions.

To further reduce the vehicle weight, many suspensions and drive shafts will be made of space-age composite materials instead of metal, according to Robert Zalokar, Mack Truck's vice president of engineering.

It's expected that on-board computers, already capable of providing management with a variety of information, will be used routinely by drivers to keep logs and other records before the Year 2000. The feasibility of the electronic driver log already is being tested in Frito-Lay's private fleet (CCJ, Jan. 1986, page 121).

In addition, several marketers of on-board computers may expand their systems to encompass satellite navigation, some form of two-way communication, and/or vehicle-locating capabilities. Benefits, for example, include the ability to instantly re-route trucks for pick-up of additional freight.

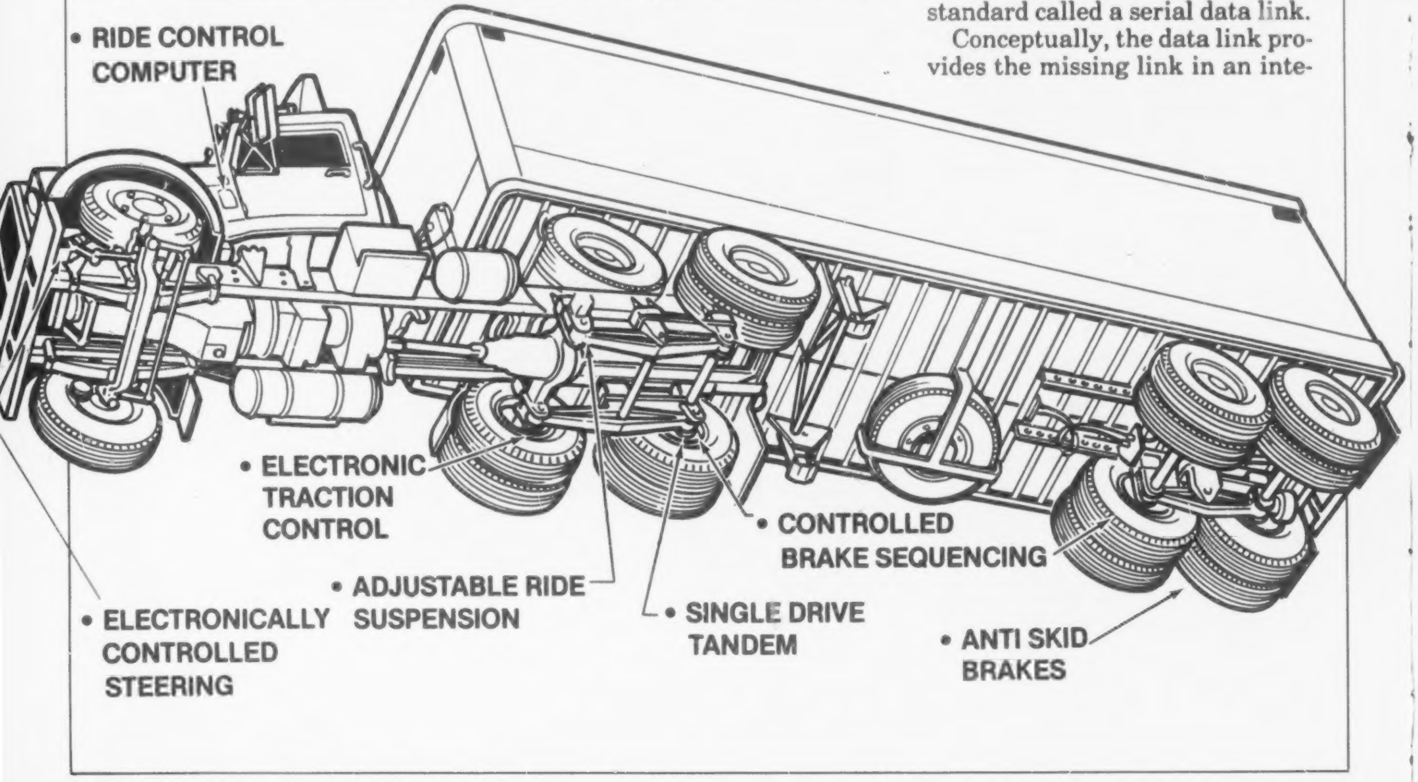
Assuming sufficient industry demand, on-board satellite navigation is likely to materialize by the mid-1990s, according to Dean Stanley, engineering vice president of Navistar International (formerly International Harvester).

Much of the future truck's basic technology is already in place, or being fine-tuned. The industry's greatest challenge, therefore, is to minimize the cost of sensors/actuators and maximize system reliability.

The immediate challenge is to ensure that all microprocessor-controlled instruments, components and on-board computers can communicate. They must speak the same electronic language.

Working toward that goal, joint committees of the American Trucking Associations and the Society of Automotive Engineers recently adopted a communications standard called a serial data link.

Conceptually, the data link provides the missing link in an inte-


• RIDE CONTROL COMPUTER
• ELECTRONIC TRACTION CONTROL
• CONTROLLED BRAKE SEQUENCING
• ADJUSTABLE RIDE SUSPENSION
• SINGLE DRIVE TANDEM
• ELECTRONICALLY CONTROLLED STEERING
• ANTI SKID BRAKES

grated but modular approach to outfitting a truck with electronics. That is, anything plugged into the system is automatically compatible with its microprocessing bedfellows.

Trucks of the future will have more electronic controls but less wiring, according to Alan Lesesky, Freightliner's project engineer for electronics and pneumatics.

He says that in less than 10 years the spaghetti-like wiring harnesses of today's trucks will be replaced by simplified, multiplex wiring systems, using fiber optics to communicate with microprocessor-controlled instruments and components via coded signals of light. A single fiber optic strand can replace several dozen conventional wire pairs of a typical truck wiring harness.

Lesesky also anticipates widespread use of wireless tire-pressure-monitoring systems linked to instrument panel displays. Monitors will be required, he says, because future trucks will ride on lightweight, low profile, super single tires.

If the electronic truck of the not-too-distance future is an electrical engineer's dream, it has all the properties of a potential nightmare for fleet maintenance executives who fear that too much electronic gimmickry will lead to increased vehicle downtime and maintenance costs.

TOTAL AIR FLOW MANAGEMENT

Despite these misgivings, engine makers will probably incorporate electronic controls as standard equipment to comply with the Environmental Protection Agency's 1987-1990 diesel exhaust emission standards and to counteract resultant declines in fuel economy.

An electronically-controlled engine will operate at low rpm/high temperature. Looking ahead, a few engine makers contend that an alternative fuel such as methanol may be required to meet the EPA's 1990 standards.

By the year 2000, truck manufacturers are expected to offer a diversity of electronic gadgets, with emphasis on providing information rather than further automating truck functions.

Included will be crash-data-recording modules, engine/component-status monitors, fuel mileage display devices, sleepy-driver alert systems and road condition monitors.

Navistar, for example, expects to unveil a voice synthesis system and radar-based, obstacle-warning systems within a year or two.

Voice synthesis is not gadgetry, according to Trevor Jones, vice president and general manager, TRW Transportation Electronics Group. He emphasizes that voice synthesis will permit smaller instrument clusters and "the ability to instantly alert a driver to a particularly hazardous event."

Above: O'Keefe's brewery in Toronto could haul 6000 one-quart bottles in this futuristic unit, which used a Mack Model EC tractor. The photo appeared in the January 1938 issue of CCJ.

It's notable that Citizens Insurance Co., a subsidiary of the Hanover Group, is reportedly offering a 20% discount to fleets equipped with radar warning devices. Obstacle-warning devices made by Vehicle Radar Safety Systems of Mount Clemens, Mich., have been used by Preston Trucking Co. of Preston, Md., for three years. So, on-board radar is more than a Buck Rogers pipe dream.

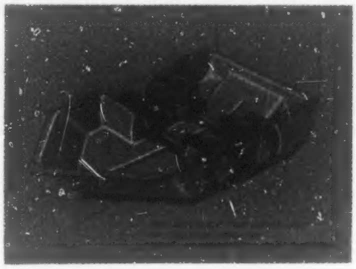
Jones says that within eight years most vehicle makers will eliminate conventional dash instruments in favor of 100% solid state instrumentation.

For example, consider the microprocessor-controlled, reprogrammable, electronic speedometer/odometer on the International 9370 tractor. This can be used with 881 combinations of tire sizes and axle ratios. It is reportedly accurate to ±1%. This indicates what the truck of the future will offer: better performance and more-accurate user information.

Here's a summary of some products under development by several truck and component makers:

- Caterpillar has developed a Programmable Electronic Engine Control (PEEC) specifically for its 3406B diesel, says director of engineering Charles Fangman.

The PEEC, provides cruise control and road speed limiting. It



will be available on the 3406 CARB (California) engine for the 1987 model year, and on 3406Bs in 1988.

- Cummins will introduce its first generation of electronic engine controls toward the end of this year, according to Paul Rabe, director of engineering. "It will be a cruise control/road speed governor built into our PT fuel pump."

Cummins' Compuchek diagnostic consoles, capable of differentiating between 50 types of engine problems, will be applicable to all Cummins engines of six or fewer cylinders by the end of 1986.

- Dana is experimenting with automated manual transmissions for Class 8 trucks, says engineering vice president Charles Jones.
- Detroit Diesel Allison will expand applications for its Automatic Transmission Electronic Control (ATEC) and Detroit Diesel Electronic Control (DDEC). The DDEC availability currently is limited to selected DDA Silver 92 engines.
- The Fuller Transmission Division of Eaton Corp. is field testing a microprocessor-controlled, automated version of the RTO-11609B Fuller Roadranger transmission for Class 7-8 trucks, says engineering electronics supervisor Donald Speranza.

The unit requires only .7 seconds to change gears, he says, and can be programmed for maximum fuel economy or maximum performance. In the economy mode, it shifts 10 times more frequently than when in the performance mode. Introduction is scheduled for 1987 or 1988. Several variations on the basic theme of transmission automation are being tested by Eaton. One is the ShiftMate, which indicates ideal shift points but exerts no direct control.

- Freightliner's Young says trucks will feature innovations such as electronic accelerators to replace mechanical linkages and bulb-warmers that triple the life of light bulbs.

Freightliner will introduce an electronic shift-prompt indicator that tells drivers what gear to use for maximum economy. "The logic for the shift indicator eventually will be integrated into automatic transmissions," Young says.

- Mack is working on electronic shift controls as well as full authority electronic fuel controls and a major vehicle electronics package being developed in cooperation with TRW. Mack also will offer an electronic version of its Maximizer road speed governor

during the first quarter of 1986. Reportedly, the electronic version is accurate to within ±1%.

- Even the "license plate" of future trucks may contain hi-tech electronics, according to Western Highway Institute. The Heavy Vehicle Electronic License Plate (HELP) is an on-board transponder accessed by a radio signal from a roadside data-collection device. HELP identifies the individual truck being monitored; its speed, weight class, total weight, length, and axle spacing; time of day; and vehicle location. Funded by state and federal transportation agencies, a three-year, $6 million feasibility study of HELP is underway (CCJ, Jan. 86, page 22).

Promises of new levels of economy and control notwithstanding, fear of the unknown and unproven, will cause many fleet operators to resist these new hi-tech trucking devises. Charles Tyrrell, vice president of special services for Gelco Truck Leasing does not intend to be one of them. "To remain competitive, fleets must exploit innovations, not fight them," he says.

"Drivers will benefit from instrument readouts of axle loads, component condition, fuel economy, routing instructions and much more. Management, in turn, will gain insight about driver and component performance, vehicle diagnostics, fuel tax data, driver's hours of service and you-name-it," Tyrrell says.

Tomorrow's Trucks

"The challenge for suppliers and fleet operators will be to make sure that these 'gee-whiz' devices will help you make more money," says Slim Robertson, maintenance vice president, ABF Freight System, Fort Smith, Ark. "If not, they will ride a hard road in the future of this industry."

"It costs about $100 million to develop new generation trucks today," says Thage Berggren, president, Volvo White Truck Corp. "That's 100 times more than in 1960."

Bill Tracy, of ATA, says basic truck technology has changed very little since the 1930s, except for the addition of air brakes and diesel engines. This fact, coupled with today's urgent call for "more productive, low life-cycle-cost vehicles," Tracy says, "is causing an applied technology wave to sweep over the industry."

Each person was speaking in support of the Tomorrow's Trucks program, a joint effort of The Maintenance Council of ATA and the Society of Automotive Engineers.

The SAE Paper 852330, *Tomorrow's Trucks: The Users' Perspective*, has nine authors. Each is a fleet manager and/or a TMC official. Written from the viewpoint that vehicle users have the most critical knowledge about truck performance in daily use, the authors make what they call "meaningful recommendations" which they believe must be incorporated into the design of future vehicles.

The Tomorrow's Trucks committee places special emphasis on the need for: equipment operating productivity and versatility; simplicity of parts and maintenance skills required to maintain equipment; self-diagnosis capability; and, of course, lowest cost of ownership.

"These things must be at the heart of tomorrow's trucks," the authors state. Specific recommendations are made regarding the need for improved electrical and instrument systems, tires and wheels, cab and controls, driver and vehicle interface, aerodynamics, vehicle crashworthiness and mechanical integrity of components.

This joint effort is intended to generate a functional dialogue between the design engineer and end user that will result in practical vehicle and equipment advances that fleet operators need. Combined with the frenzy of effort on all other fronts to advance the level of technology in tomorrow's trucks, the industry someday rightfully may be able to use the phrase "hi-tech trucking," without causing a giggle to rise from the mouths of the doubtful.

That Ole Truck Market Ain't What It Used To Be!

Vehicle and tonnage markets are changing dramatically and will continue to evolve in the coming years. There are both varying opinions and much consensus on how the industry's two major markets will be reshaped in the years ahead. Here, CCJ presents a number of insights, some provocative, from individuals within both markets and from industry analysts outside of trucking.

The Fleet Side

Despite the chorus of moans and groans that have echoed through the trucking industry since the passing of the 1980 Motor Carrier Act, many prominent trucking industry leaders and veterans are enthusiastic about the industry's future. If there is a common perception regarding the future, it is the optimism they share about the coming years.

Kenneth Younger, the president of Carolina Freight Carriers, Cherryville, N.C., observes, however: "If you are one of those who have been forced out [of business] since 1980, you can't possibly feel good about anything. But for those of us who survived and are flourishing, there is nothing but challenge and opportunity."

What follows is a series of projections about the future, based on extensive interviews with industry leaders including Younger; Anthony Burns, president and CEO of Ryder Systems, of Miami; Richard Few, president of Cooper Motor Lines, Greenville, S.C.; and others.

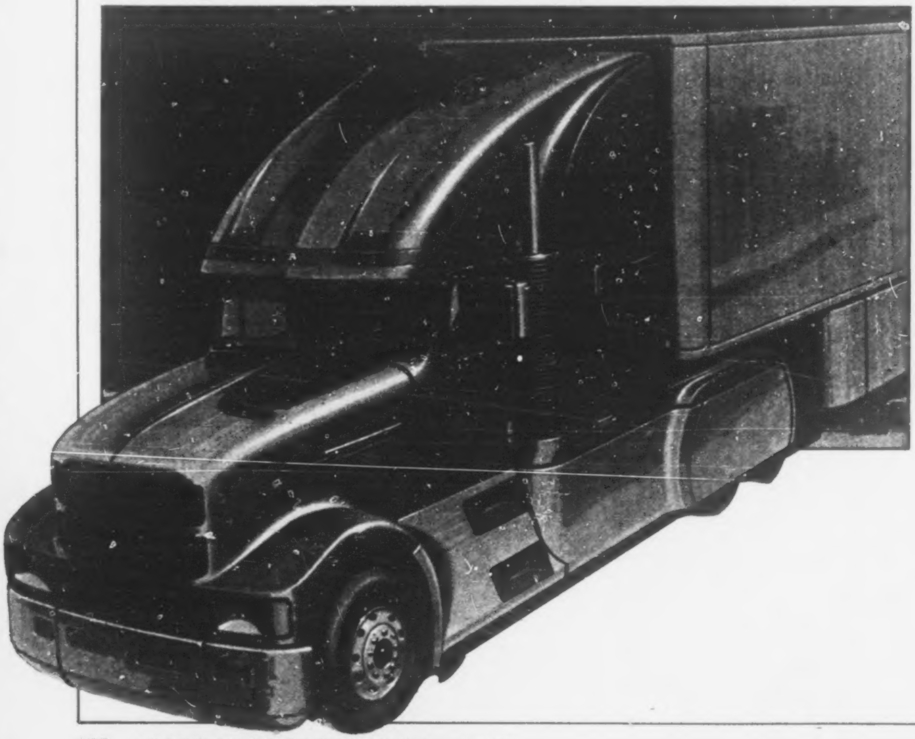
Here are developments they say fleet operators can expect:

- A significantly restructured industry with a dozen or less major transcontinental carriers of less-than-truckload freight.
- Elimination of rate immunity with tariffs based on individual contracts negotiated between shipper and carrier.
- De-emphasis of the so-called trucking company, and the appearance of total transportation companies specializing in distribution and warehousing, coupled with freight hauling, using all transportation modes.
- Acceleration in computer use, especially on-board computers that monitor driver and vehicle, and computer systems linking vehicles, shippers and carriers.
- A gradual reduction in the need for Class 8 highway tractors as the U.S., once a nation of smokestack industries, becomes more of a service-oriented economy.
- Development of a single, standard truck driver's license and a single, nationwide vehicle licensing system for interstate commercial vehicles.
- Reduction of private carriage as companies turn their truck operations over to others, like Ryder Systems, in the name of greater cost-efficiency and increased productivity.

"The industry will see more progress in the next five years than it has in the last 10," says Donald Estes, president of Ryder's Vehicle Leasing and Service Division. Estes says, for instance, computers that enhance vehicle dispatching, driver log recording and freight movements and eliminate paper bills-of-lading are coming on strong.

While welcomed by the industry in the name of efficiency, computerization brings with it significant problems. Those interviewed for this section see computer technology outpacing user education. As Richard Few of Cooper Motor Lines observed: "Tomorrow's mechanics are going to have to get a lot smarter." The question is: Who is going to provide the financing and expertise to train mechanics to fix a computerized road tractor?

Few, a past chairman of the American Trucking Associations, says short-term problems include increasing insurance rates, improving driver safety, plus ship-



per concern over the "financial stability of carriers" serving the truckload (TL) market.

The president of Ryder's Distribution Systems Division, Thomas Mainwaring, agrees. He says the insurance industry will solve its problems in three to four years.

Few says: "Each segment of the industry–LTL, TL, contract and private carriage–will surrender their individual differences as the interests of each segment diminish because of deregulation." This means, in the next 10 to 15 years there will be less distinction between motor carriers.

Efforts to anticipate the future must be tempered with the interests of individual companies and the role they play in the marketplace. But there are commonalities that affect every company. One is labor; the other is equipment.

It is generally believed the International Brotherhood of Teamsters will remain a potent force. But the way the union operates and the way it negotiates contracts will change. Industry veterans agree that the concept of the National Master Freight Agreement is dead. They also agree that there will be group negotiations involving motor carriers with common interests–carriers like Consolidated Freightways, Roadway and Yellow Freight. Otherwise, labor negotiations will be tailored to individual fleets, regions or distribution patterns.

Carolina's Younger says survival of the Teamsters will be based on the number of mergers we see. He characterized the union today as skittish and lacking organizational ability.

Few, Mainwaring, Younger and Estes see an increasing trend toward the vanilla truck. While each views this trend from a different perspective, and understands that competitive economics are forcing truck assemblers in that direction, they are not sure they will be happy with the outcome.

Ryder people favor the trend, having developed vehicle specs with standard components long ago. They see it as a means of controlling future costs and being more efficient. Efficiency, they report, that comes with: knowing each component's life cycle and performance; reduced spare parts inventory in a nationwide system that operates more than 80,000 vehicles; mechanics familiar with the vehicles and equipment they must work on.

Younger, with his fleet of 7000 trucks, tractors and trailers, sees it another way: "The European truck manufacturers have to understand that I don't want some engineer in Sweden or Tokyo dictating what I'm going to run." Younger acknowledges, however, that tomorrow's purchases will be based on price. "If six manufacturers bid on the kind of tractor we want for Carolina, we are going to buy at the lowest price. I don't care who the assembler is." Younger adds, however, that "Carolina won't buy a truck that isn't manufactured in the U.S."

Few says: "I personally am in favor of spec'ing a truck to do a specific job." But he is quick to add that he likes the idea of limiting components if it holds the line on prices.

Mainwaring says: "With so much out-sourcing by manufacturers and suppliers, I question what is a U.S. truck today." He favors the plain vanilla concept, saying it should make everyone more efficient and cost-effective. However, he maintains that "companies will still have a choice of equipment in the future."

No matter what the outcome of the spec'ing debate, those interviewed agree that some assemblers will withdraw from the market due to over-capacity.

Younger says there will be greater use of intermodalism because it is more efficient. "There will be fewer trucks running coast-to-coast. We just won't need the big, Class 8 over-the-road sleeper in the same numbers as today."

According to Younger: "The owner operator, as we know him today, will be non-existent. We'll still have the independent, but he will operate under company control. The company will dictate his equipment based on that carrier's costs."

Few, who uses owner operators exclusively, agrees: "In the future, the non-union, truckload carrier that operates with company-owned equipment will be the most efficient. They will be the companies dominant in TL. They will be the carriers that will be around 25 years from now."

Few does not predict the demise of the owner operator, only in the way he operates. He says the owner operator's future also depends on tonnage. "If the nation's industrial capacity to produce explodes and there is a sharp increase in freight tonnage, owner operators will get the overflow. But that's the only way he will be able to survive in the future."

Mainwaring says the truckload segment is moving toward company-owned equipment rather than depending on owner operators, because it is the only way to control costs. "If you can't control your costs, you won't be able to remain in business," he said. He notes the excess capacity in equipment is concentrated in the TL segment.

Among those interviewed, none wanted to return to a federally regulated industry. Anthony Burns, president and CEO of Ryder Systems, says there is no place in a free society for regulation. "Ultimately, the people who benefit will be consumers. Deregulation opened doors to all kinds of possibilities for private companies," Burns says. He predicts the country will see private companies getting back into providing "those kinds of services they once provided, such as operating city bus lines. Deregulation," he continues, "provides a more efficient system for the country."

"Under 50 years of regulation, nobody could be creative," Estes says. "Now you must be creative to survive. Our country got fat and lazy. Now people have started supervising themselves, and with that comes opportunity. There will be lots of changes, lots of opportunity and lots of training needed because the free market creates opportunity."

Burns says Ryder Systems will spend $1 billion on expansion in the next two to three years. In the future, Burns said he may take Ryder into the regional LTL market. He predicts some limited growth in full-service leasing and a slow-down in the growth of private carriage.

Richard Henderson, director of Private Truck Council of America, acknowledges there might be some shippers that will switch to common carriage. But, he says, private trucking is so big, the slowdown hardly will be noticed.

Asked if he had any desire to return to regulation, Carolina's Younger said bluntly: "Hell, no! I enjoy the competition, and I am very optimistic for the future. It has been an exciting period, and I believe it will continue to be exciting."

"There is some uncertainty now under deregulation, that is troubling shippers," says Few. "So long as there is a surplus of capacity, shippers are in the driver's seat. But if that surplus becomes taxed, shippers may want to return to some regulation."

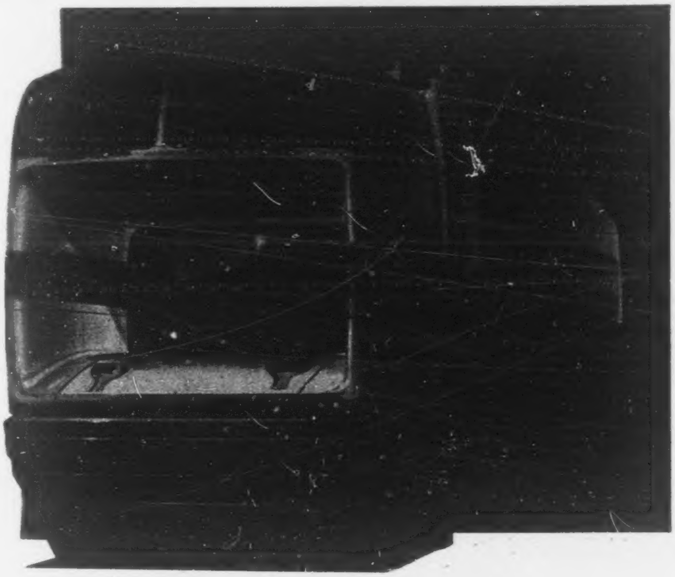
"It is going to be very expensive for carriers to stay in business," says Estes. "They are going to need deep pockets. For instance, it is going to cost millions to update and replace underground tanks over the next five years. This will take a lot of people out of the market."

The Supplier Side

Because of the strong buy-American resistance many readers have against foreign products and their suppliers, and because of competitive sensitivity, virtually everybody interviewed for this section agreed to do so with the stipulation that they not be quoted. Readers, therefore, will not have the benefit of knowing "who said what." You should nevertheless understand that many top executives on the supplier side contributed to the insights that follow.

Internationalization of trucking suppliers is the most profound force reshaping all aspects of the domestic truck market today. Foreign companies own or control approximately 40% of the domestic heavy-duty truck market share today (Renault/Mack, Volvo/White, Mercedes/Freightliner). Many believe this percentage will rise in the near future.

This influx of offshore truck builders into North America is contributing to a change in basic manufacturing philosophy, toward vertical integration from horizontal integration. That



change is causing to be tested many long-standing business relationships between parts and component vendors and truck builders as each reduces the number of options engineered into their products.

Fleet operators are discovering that the economics of competition, combined with certain foreign product advantages, means it may not be prudent to cling tenaciously to a buy-American policy that continues in many companies today. Some have taken the position, for instance, that there is nothing inherently wrong with a vertically integrated truck (vs. a custom spec'ed vehicle), provided it is properly engineered for the geography and vocation in which it is to be used.

These are examples of the wide-ranging impact foreign companies will continue to have in the domestic truck market. In addition, industry watchers say we will witness a continuation of the current rash of mergers, acquisitions and joint-technology development programs (domestic with foreign).

There will be increasing homogenization of domestic truck brands as they begin to sprout more foreign truck components, especially engines, axles and drivelines. This trend is well-established in at least two domestic brand trucks. Volvo White Truck Corp. is market testing Volvo engines and other components in its White model trucks, and Mercedes-Benz is doing the same in Freightliner models.

Also, the metrification program of American military vehicles will spill over into commercial vehicles. This will drive alterations in manufacturer's tooling that also is used to produce commercial vehicles, parts and components.

Fear of an industry shakeout among parts vendors, component suppliers and vehicle assemblers is still very real to those interviewed for this section. Projections differ, however, as to when the shakeout will occur and the degree to which it will reduce the number of companies supplying products to the trucking industry.

The conservative view is that component suppliers will remain dominant in markets where they are now strong and they will "fall off" not "fall out" of markets in which they are weak. The other view is that foreign competition will force a drastic reduction in the number of suppliers to the industry, and that it will begin with the next downturn in the economy. One widely held opinion is that for a supplier to prosper in the trucking industry of the future, it will need to be a "world supplier" with an international manufacturing base, enabling it to gain the economy of scale needed to compete in the increasingly price-sensitive market of tomorrow.

Overall, fleet operators should see moderate truck price increases in the near future. Prices will be held low by intense domestic and foreign competition and by improvements in manufacturing productivity and cost control. For instance, Jim Henderson, president, Cummins Engine Co., Columbus, Ind., says their goal is to reduce cost 30% by 1987. Whether or not increased manufacturing efficiencies like this are achieved, the efforts to achieve them will benefit buyers.

In the coming years, more fleet operators will select suppliers with extra caution when evaluating a potential supplier's market prowess and staying power.

Used truck buyers will play a more important role in the years ahead. There is growing concern among truck builders about their ability to deal with used trucks in a profitable manner as future truck technology begins to widen the productivity and cost-of-ownership gaps between the next generation of trucks and the current generation.

As the large, financially sound trucking companies upgrade their fleets with more efficient, technologically advanced vehicles, they will be trading in large numbers of used vehicles which, from a technology and efficiency standpoint, may be considered obsolete by tomorrow's standards.

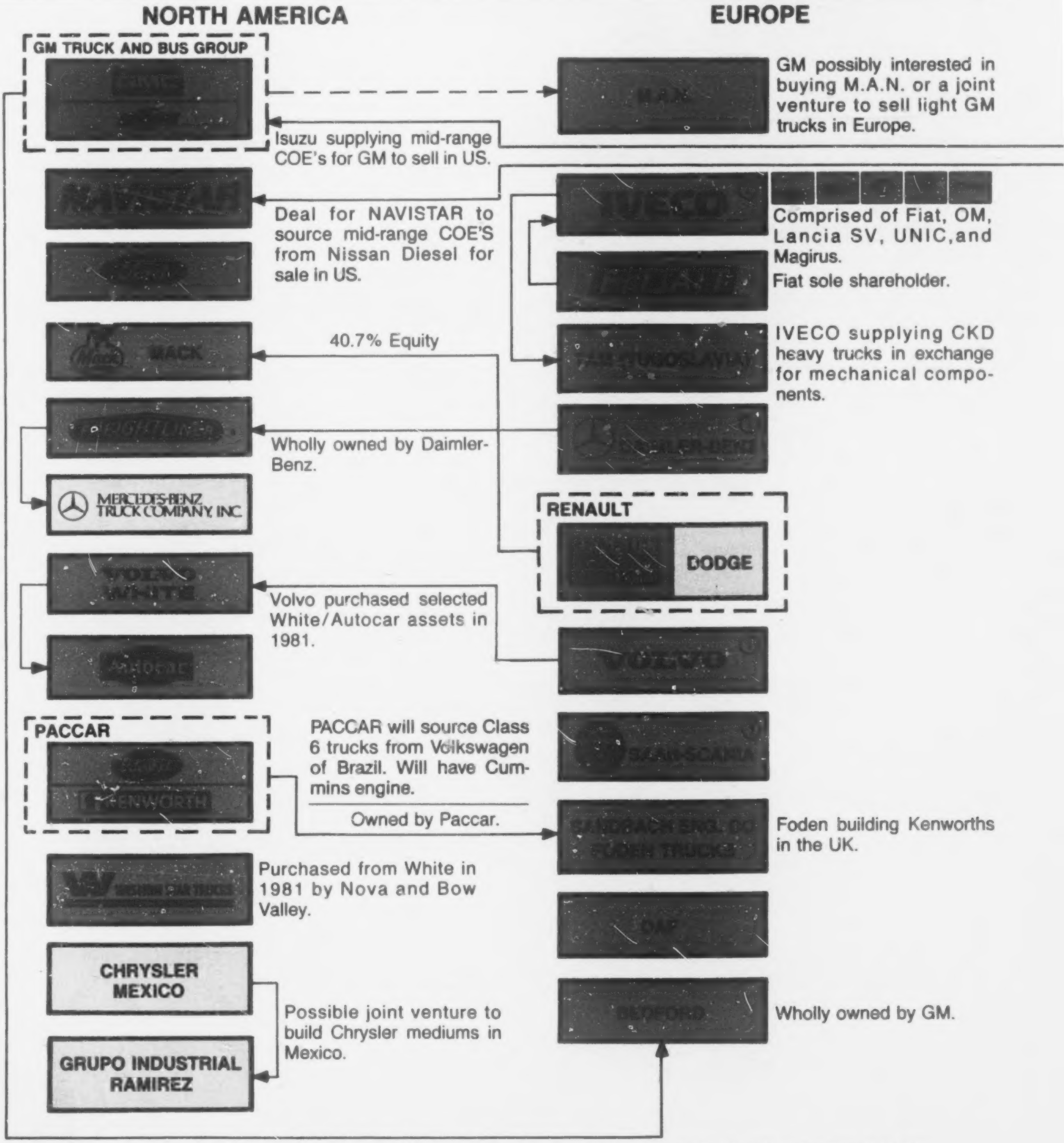
Those interviewed for this section agree that technology's rate of advance will rapidly increase between future generations of trucks. Whereas trucks five years ago were technologically similar to trucks from 10 years ago, this will not be the case 10 years from now when trucks will be much more efficient and technologically advanced. This concern for technological obsolescence is a new dilemma for truck marketers who must find buyers for tomorrow's used trucks in order to open the market for their new trucks. This is especially critical to volume-sensitive, domestic truck builders.

Some say this will drive a resurgence in truck reconditioning, as manufacturers begin to look for ways to upgrade used trucks, taken at trade-in time, in a way that will make them more desirable to the traditional used truck buyer. Other impacts, CCJ is told, may be the initiation of longer used

INTO THE 21st CENTURY

MEDIUM AND HEAVY-DUTY TRUCK JOINT VENTURES AND MERGERS

A look at what's happening in the international truck markets.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GM TRUCK AND BUS GROUP
M.A.N.
NAVISTAR
IVECO
MACK
TAM (YUGOSLAVIA)
FREIGHTLINER
DAIMLER-BENZ
MERCEDES-BENZ TRUCK COMPANY, INC
RENAULT
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VOLVO WHITE
AUTOCAR
VOLVO
PACCAR
KENWORTH
SAAB-SCANIA
SANDBACH ENG. CO FODEN TRUCKS
WESTERN STAR TRUCKS
DAF
CHRYSLER MEXICO
GRUPO INDUSTRIAL RAMIREZ
BEDFORD
40.7% Equity
Owned by Paccar.

GM possibly interested in buying M.A.N. or a joint venture to sell light GM trucks in Europe.

Isuzu supplying mid-range COE's for GM to sell in US.

Deal for NAVISTAR to source mid-range COE'S from Nissan Diesel for sale in US.

Comprised of Fiat, OM, Lancia SV, UNIC, and Magirus.

Fiat sole shareholder.

IVECO supplying CKD heavy trucks in exchange for mechanical components.

Wholly owned by Daimler-Benz.

Volvo purchased selected White/Autocar assets in 1981.

PACCAR will source Class 6 trucks from Volkswagen of Brazil. Will have Cummins engine.

Foden building Kenworths in the UK.

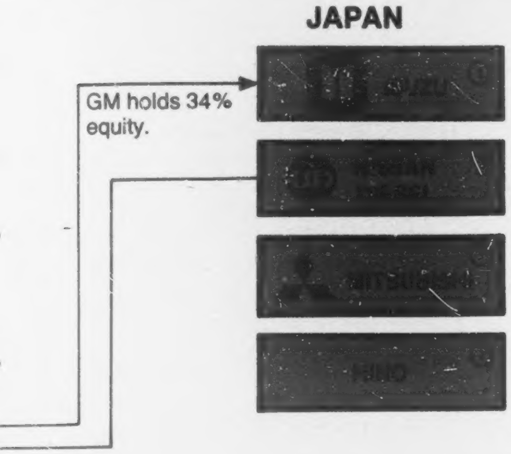
Purchased from White in 1981 by Nova and Bow Valley.

Possible joint venture to build Chrysler mediums in Mexico.

Wholly owned by GM.

* Freightliner is co-signer for Daimler-Benz in deal with FAMSA to produce heavy and medium trucks, chassis and engines in Mexico.

INTO THE 21st CENTURY



Key

▨	Heavy Truck Mfg.
☐	Medium Truck Mfg.
▨	Heavy and Medium Truck Mfg.
①	Exporting mediums to the US.
②	Exporting Heavy Trucks to the US.

Many of the smaller concerns building medium and heavy trucks in third world countries are not listed here in order to reduce the chart's complexity. Since we will be updating this chart from time to time, any feedback from readers would be appreciated.

Main Heavy Truck Contenders on World Market

(Class 8—Units/Production)

	1983*	TOTAL	1984*	TOTAL	1985**	TOTAL
Daimler-Benz	46,978	58,750	38,366	58,346	36,000	55,500
Freightliner	11,772		19,980		19,500	
Renault	16,952	31,145	15,724	44,798	17,000	44,000
Mack	14,193		29,074		27,000	
Volvo	23,395	28,516	23,865	33,764	28,000	38,500
White	5,121		9,899		10,500	
International Harvester		21,317		35,681		32,000
Kenworth	9,349	17,852	15,718	30,360	12,500	23,500
Peterbilt	8,503		14,642		11,000	
Saab-Scania		16,743		22,100		23,000
Hino		14,978		21,080		19,000
Mitsubishi		15,250		20,483		20,000
Nissan		15,718		19,062		15,000
Ford		9,070		18,845		21,000
Chevrolet	561	9,040	893	18,025	1,000	15,000
GMC	8,479		17,132		14,000	
Isuzu		15,488		17,360		15,000
Iveco		19,848		16,556		18,000
M.A.N.		11,329		11,154		14,000
TOTAL		285,044		367,614		353,500

*1983-84 Source: PRS Consulting Group Inc. **1985: Chilton Estimate truck warranty periods and the need for dealers to work harder at capturing and preserving the trust of used truck buyers in the local market.

New truck buyers will be affected by the used truck problem as well. The practice of guaranteeing residual values, as part of new truck purchase negotiations, will be less prevalent, and residual guarantees that are given will be much more conservative. This is because truck marketers will be dealing with a higher degree of price uncertainty for the used vehicle.

Will there be a glut of used trucks? Most analysts say there will not. They add, however, that used truck prices will be low and that a buyer's market may prevail for a period of time. There are indications that future buying practices of owner operators (a prime used truck market) will be toward a less premium spec'ed vehicle. This would limit practices now used by new truck buyers, such as spec'ing a vehicle at 400 hp and de-rating the engine to 350 hp for fleet use, then re-rating it at 400 hp to make the vehicle more desirable to owner operators in the used truck market.

In any case, fleet operators will want to give more consideration to the value and application of used trucks, whether they are buying new or selling used.

What shape the trucking industry of tomorrow will assume, depends in large measure on who you talk to today. The bottom line is, nobody knows for certain. One thing about which everybody agrees, however, is that it will be much different from today.

If only one thing about the future is clear, it is that trucking is rapidly becoming a more sophisticated and increasingly competitive industry. Perhaps the most critical need will be for talented workers in all segments of the industry—engineer-ing, manufacturing, marketing, lobbying, fleet management, truck mechanics and, of course, drivers. To prosper, the industry will need to attract well-educated, talented, energetic managers and employees in all positions.

"I see lots of opportunity in our industry for young people," says Carolina's Younger. The challenge for the industry will be to have young, talented people agree with him.

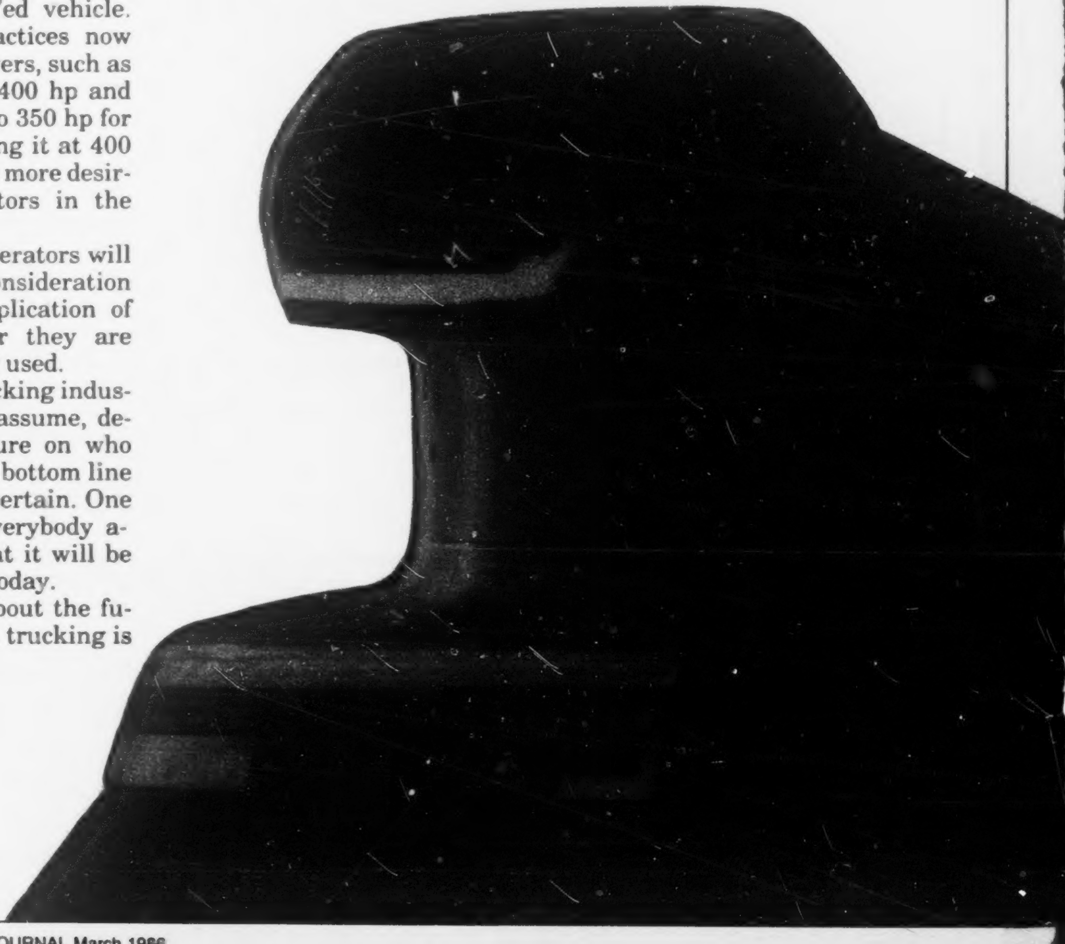
What Analysts And Other Observers Say

"Never make forecasts, especially about the future," warned Sam Goldwyn, the Hollywood mogul. Despite that admonition, we asked a number of industry analysts to share with us their predictions about the future.

Michael Galardi, a vice president and motor carrier industry analyst for Temple, Barker and Sloane, a Lexington, Mass. management consulting firm, embraces the widely held projection that *total* deregulation will be here "sooner rather than later." He also says: "The Sun Belt will continue to gain traffic from other areas."

Ronald Roth, director of American Trucking Associations' Statistical Analysis Department, says the U.S. economy is projected to grow at 3% to 4% annually, and "trucking will have tight margins" for the balance of the decade.

Priscilla Luce, director of indus-



trial analysis for Wharton Econometric Forecasting Services, in Philadelphia, says trucking has gained market share relative to other modes. In 1975, the industry captured 42.5% of U.S. transportation dollars (constant, value-added); railroads had 21.0%. In 1985, trucking's share increased to 44.1% while the rail share declined to 16.5%. By 1995, there will be little change, says Luce, with truck and rail shares each increasing by less than 1%.

Luce also says that, despite hand-wringing over the volume of goods imported into the U.S., it stabilized at 10.4% of the U.S. gross national product (GNP) in 1985, after surging from 5.8% of the GNP in 1975. By 1995, Luce projects, the import share will rise only 0.5% more.

Luce feels, numbers notwithstanding, that the trucking industry will continue to feel a negative impact (in tonnage) from imports. She says this is because imported goods miss several transport stages that domestic-made products undergo—for example, natural resources hauled from the mine to the processor, then to a fabricator, to the wholesaler/distributor in the production formula.

There will be a greater concentration of major LTL carriers, probably no more than five or six, according to Stephen Klein, an analyst who follows the motor carrier industry for Standard & Poor's Corp., of New York City. Klein doesn't believe that employee stock option plans (ESOPs) will be a successful means of economic survival for unionized carriers because "the problem is, they'll have the same management."

Klein says, by the year 2000, the 10 largest LTL carriers will haul 65% of all LTL tonnage, up from today's 47%. They will increase their total share of revenues from that tonnage to 85% from 75%. That would indicate that the profitable top LTL carriers will have even greater earnings tomorrow. (*Editor's note: Klein made this statement before the nation's eighth largest for-hire carrier, McLean Trucking Co., filed for Chapter 11 in January under the Federal Bankruptcy Code.*)

Klein expects more LTL carriers to establish double-breasted operations and that these non-union subsidiaries will someday dominate the TL market.

ATAs' Roth also expects large LTL carriers to continue to grow disproportionately larger. He foresees big LTL carriers expanding vertically, offering full service TL, LTL, contract, intermodal and package delivery to clients.

Drew Robertson is a marketing director for Reebie Associates, a Stamford, Conn.-based management consulting firm that watches the trucking industry for Chase Econometrics of Philadelphia. He says publicly held LTL carriers also will become bigger because of pressure from Wall Street to expand.

High technology will impact on the trend toward mega-carriers. As David Stubblefield, senior vice president of marketing, at ABF Freight System, Inc., Fort Smith, Ark., explains: 50% of truck traffic is acquired from major companies that have significant information transmission systems, so they will be drawn to fleets that offer paperless communications such as electronic data interchange of shipping documents. All the major national carriers now have that capability, says Galardi, but "well-managed, small and medium-sized carriers can plug into those systems."

Electronic communications between shippers and carriers-of-choice will make the dialog "less confrontational," with the respective sides seeking reasonable rates and acceptable profits, suggests Hank Schmidt, assistant vice president and director of corporate relations at CF Industries, Palo Alto, Calif.

Like their LTL cousins, many private fleets will become huge resulting from large corporate consolidations or mergers and because they'll take advantage of regulatory freedoms gained in recent years, claims Roth.

Klein predicts private carriers will continue to be a dominant factor in the industry; they also will increase their use of for-hire and contract carriers. Galardi thinks private carriers are already losing a share of their market. He says total deregulation will provide a creative and competitive climate for contract and for-hire carriers. This "will exacerbate" the private carrier's decline. "Why be a private carrier if you offer no competitive advantage?" asks Galardi.

The ever-shifting U.S. economy will continue to impact the trucking industry in less-than-obvious ways, explains Reebie Associates' Robertson. Consider how direct marketing has impacted trucking, he suggests. For many years, department stores used their delivery service—often contracted to United Parcel Service—as a marketing tool, offering to transport even lightweight packages to customers' homes. That service became cost-prohibitive, except for furniture and large appliances. Today, however, consumers often shop by mail and telephone—direct marketing, whose distributors provide truck delivery to every buyer's home, not to stores. Ironically, UPS has recaptured the traffic it lost to market dynamics many years ago.

None of those interviewed see a significant increase in intermodalism. Stubblefield, however, is concerned about inherent labor problems. ABF's union driver roster, for instance, must be exhausted before an intermodal connection can be sought. He's confident the problem can be solved because the labor atmosphere is changing for the better.

There is limited support for the concept of one-stop shopping—one or more computerized super brokerages for shippers seeking carriers and fleets in search of loads. S & P's Klein speculates the day may come when a Merrill Lynch or a Sears' type financial services group will use its information management resources to establish a huge transportation brokerage. Their services could be far more extensive than anything typical trucking brokers offer. Robertson disagrees, observing that the transportation brokers' margins are too slim to attract big-time money.

Even if one or more national brokerages is successful, that doesn't mean small, well-managed, brokers will become obsolete, according to Robertson. Brokers profit from personalized service and shippers' inefficiencies, he says. "A typical broker knows more about the trucking business than many small shippers."

Truck service pricing also is changing because large LTL shipments are less likely to subsidize small LTL shipments, explains Stubblefield. Since 1979, he points out, minimum charges and rates for shipments of less than 500 lb increased 81% more than rates for 1000- to 5000-lb shipments.

To survive in the coming years, carriers must use realistic pricing to *increase profits*, not just to cut losses, says William Legg, an analyst for Alex. Brown and Sons, a Baltimore stock brokerage. "A carrier with a 98 operating ratio can't build capital to replace equipment or expand its operation."

This brings us back to an admonition stated in the beginning of this special future section: "Don't let the evolutionary pressures of today prevent you from preparing for the opportunities of tomorrow."

Sources Of Information

Noted below are the worthwhile publications CCJ's editors used to research and write this special 75th Anniversary section. The materials are not available from CCJ; they can be acquired from the sources indicated below. There may be a charge for the publications in this listing; readers should inquire before ordering.

Market
Industrial Analysis Service's "10-Year Outlook"
November 1985
Wharton Econometric Forecasting Associates
3624 Market Street
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215-386-9000

Technology and Tomorrow's Trucks
Tomorrow's Trucks: The User's Perspective
SAE Paper 852330
Society of Automotive Engineers
400 Commonwealth Drive
Warrendale, Pa. 15096
412-776-4841

Proceedings P-154
International Congress on Transportation Electronics (Convergence 84)
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Anti-lock Braking Systems for Road Vehicles
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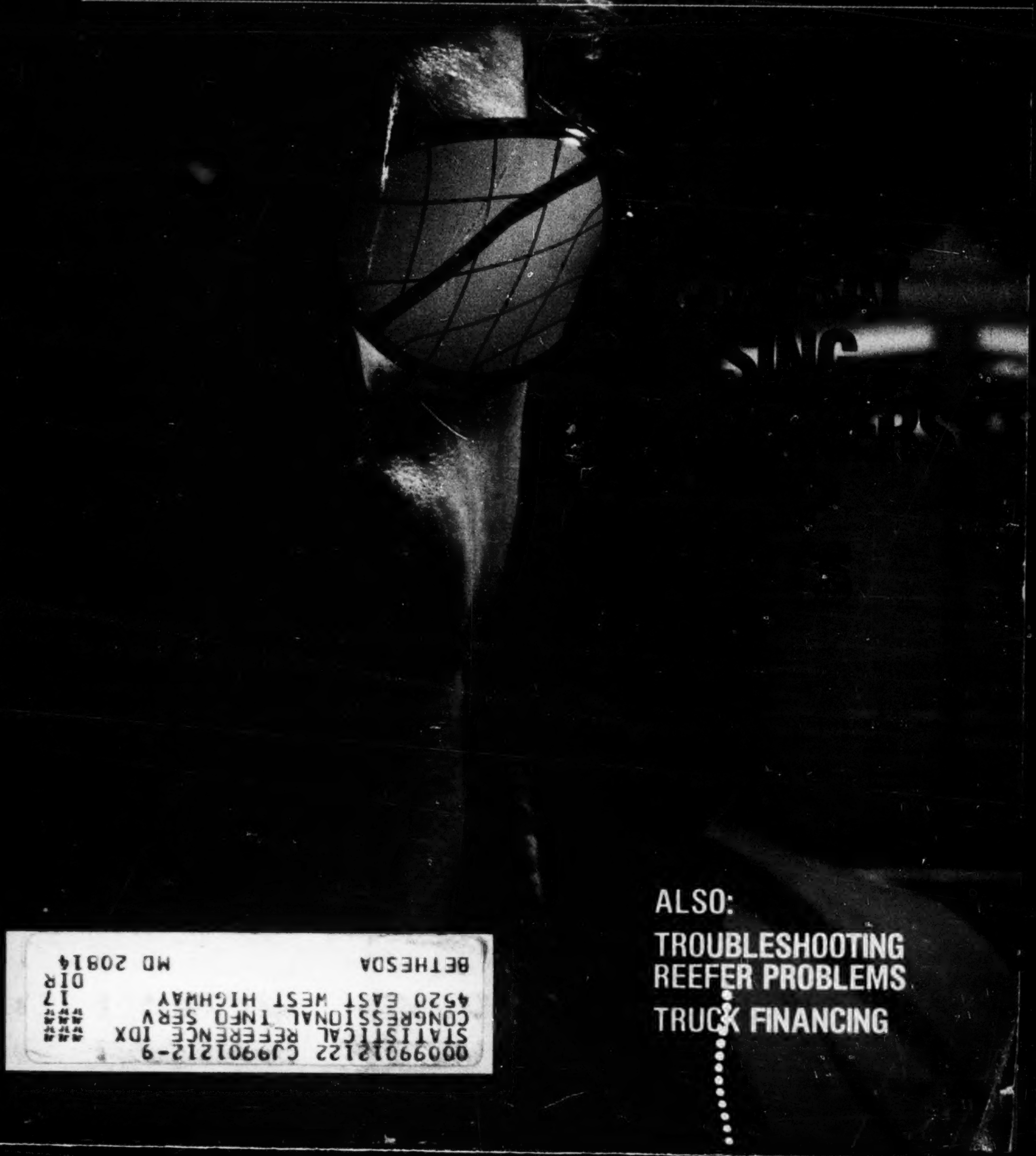

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VOLUME 143 NUMBER 6 JUNE 1986

TOP 100 ISSUE; RIESEL SHALL RETURN

The exclusive listing of Top 100 and Second 100 common carriers, plus the leading private fleets and statistics on truck factory sales and trailers in use, make CCJ's July issue a traditional winner. This much-in-demand edition will include more in-depth information than ever before.

Inside Labor won't be published in this issue while Victor Riesel is recovering from surgery.

Chilton

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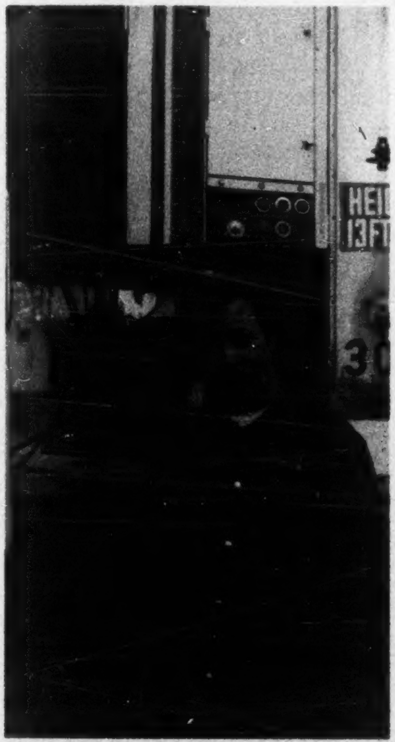

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Although the trucking industry continues to be plagued by increasing workers' compensation costs, here is how some fleets are cutting expenses resulting from work-related injuries and illnesses. 70

TROUBLESHOOTING EN ROUTE REEFER PROBLEMS

A headache many carriers face is how to deal with refrigeration problems when the unit is far from home. This article focuses on good communications procedures that should help put en route reefer problems on ice. 74

A FINANCING PRIMER YOU CAN BANK ON

To avoid being caught on the short end of the money stick, this primer on truck financing discusses the basics of borrowing money to buy capital equipment, and what lenders expect of corporate borrowers. 80

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COMBAT RISING WORKERS' COMP COSTS

By **KEN MACDONALD**, *Western News Bureau*

Profit-squashing increases in vehicle-related liability insurance premiums and widespread policy cancellations are hallmarks of the 1985-86 insurance crisis.

In addition to those recent miseries, a longstanding insurance problem, workers' compensation coverage, continues to plague the U.S. trucking industry. But workers' compensation costs can readily be reduced, fleetmen tell CCJ.

"We feel our workers' compensation costs are finally under control," says Eugene Kane, chairman and CEO of E.I. Kane, Inc., whose trucking, office moving and warehousing business serves the District of Columbia, Maryland and Virginia.

One of the problems with workers' comp is its resemblance to no-fault insurance, Kane says. If an employee claims he was injured on the job, it's up to the employer to ferret out any falsehoods. Unfortunately, the employee is usually the only one present when the injury occurs, making it difficult or impossible to detect false claims.

The key to curbing false claims is total management involvement with its insurance carrier, Kane adds. Involvement includes working with the insurance company to process claims and being present at all hearings. Far too often, Kane points out, only the insurance company's lawyer or representative attends the hearings on management's behalf.

"Ideally, hearings should be attended by three or four members of company management," contends Kane. Despite the cost of managers' lost time, "it's worthwhile," he insists.

Kane targets personal injuries in its annual safety-award program. "We give employees just as much credit for no personal injuries as we do for a safe driving record." In fact, Kane awards trophies to employees for a prescribed number of injury-free years. "We try to improve the safety-consciousness of all employees...make them proud of an accident-free year.

"There's a tradition of leniency in awarding compensation," says Kane. "And a person who has profited greatly from past compensation has a tendency to seek similar compensation in the future. Psychologically, a big-money award for a minor injury frequently succeeds in destroying the good old American work ethic," concludes Kane.

With this fact in mind, Kane follows a practice strongly recommended by 90 insurance companies handling workers' compensation: carefully research the compensation record of a job applicant. And Kane's not alone.

"Check 'em out," Yellow says.

Ken Thompson, vice president-safety for Yellow Freight Systems, Overland Park, Kan., says it pays to make a background check of a prospective employee, via an outside service. Yellow uses James Van Ella & Associates, Chicago. He also recommends making phone calls to previous/current employer(s).

Find out if the prospective employee has a history of workers' comp

Continued

> **"There's a tradition of leniency in awarding compensation and a person who has profited greatly from past compensation has a tendency to seek similar compensation in the future. Psychologically, a big-money award for a minor injury frequently succeeds in destroying the good old American work ethic."**

claims, lost-time injuries, malingering, and/or absenteeism, suggests Thompson.

Ideally, Thompson says, the Department of Transportation physical required of driver-applicants should be conducted by a company doctor or a physician conversant with demands of the job. Too often, he says, a man's personal physician will dismiss a back problem as being of no immediate concern, rather than hurt his patient's chances of employment.

Driver-applicants have used numeroustricks to cover up physical shortcomings, Thompson adds. In one instance, a man with a glass eye had his identical twin brother impersonate him during a physical exam.

Most claims, according to Thompson, result from back injuries sustained by dock workers or local drivers who must load and unload freight. In contrast, relatively few cases involve maintenance shop personnel.

Malingering is an ever-present threat, so Yellow's supervisors periodically telephone the injured party (without risking a charge of harassment) at home to inquire about his condition. If there's reason to suspect malingering, it's Yellow's option to investigate the situation, according to Thompson.

If caught physically exerting themselves or in physically-demanding employment, malingerers are usually induced to return to their jobs, says Thompson. Alternatives include threat of disciplinary action or dismissal, if the fleet has solid evidence of fraud.

Sometimes Yellow sends a claimant to a radiologist for x-rays, or to a medical specialist for an in-depth examination. Resultant reports have, on many occasions, proven valuable.

Thompson does not advocate placement of a recuperating employee in a light-duty job, even as a temporary substitute for his former duties. There's a risk, he says, that the employee might become disgruntled and sue the company for job discrimination or file a grievance with the union.

Speaking of union intervention, the Teamsters' National Master Freight Agreement requires fleets to provide employees with hazardous materials training. To comply with that requirement, Yellow has recently published a 46-page manual and generated a 12-minute videotape training film. The materials are supplemented by monthly safety talks for maintenance shop workers and freight handlers, with topics ranging from proper lifting procedures to contending with hazardous materials spills.

In addition, Yellow plans to place a specially-equipped training vehicle in service. This vehicle will circulate through the carrier's system, providing safety instruction to drivers, dockmen, mechanics and supervisors.

"Visit the injured," Carolina says

Lenny Massare, loss and damage control manager at Carolina Freight Carriers Corp.'s Carlisle, Pa. facility, thinks a large part of the problem is legislation that encourages extended compensation. States "make it too easy to continue to collect," he maintains.

According to Massare, one way to get workers back on the job quickly is to keep in touch. "I'll call the guy in the hospital," he says. "It shows him you care. It used to be: 'Keep away. Don't touch, you'll get burned.' But no more. Now it's: 'Let's visit him.'"

Mark Stewart, Carolina's director of safety, cites another reason for keeping track of injured personnel. "We'll have someone go out to see him. If he's got grease under his fingernails, he's been

An overview of workers' comp costs

Employers complain that insurance premiums are so high they drain away profits.

Insurance companies complain that abuses of workers' compensation regulations and employer failure to maintain safety standards create floods of claims that threaten to bankrupt them.

And, while state legislatures continue to increase workers' compensation benefits, employees complain that compensation for on-the-job illness or injury is inadequate as a substitute for weekly paychecks.

Investigative reports constantly uncover incidents of greed, thoughtlessness, selfishness, carelessness and outright fraud.

Premiums employers pay for workers' compensation insurance vary between states and occupational categories. For example, California has approximately 500 categories just for the trucking industry.

In 1984, the number of work-related injuries and illnesses in private industry, according to the U.S. Labor Department, rose 11.7%, with eight incidents of injury or illness for every 100 full-time workers. In 1983, it was 7.6 incidents per 100 workers.

The increase was the largest single-year jump since 1973, with 5.4 million job-related injuries or illnesses in 1984: almost a 10% increase in the number of claims. Employment rose over four million during that period.

In 1983, states paid a total of $14.9 billion in workers' comp benefits, up from $13.7 billion in 1982. California paid the highest total, $2.2 billion, and Texas was second, with slightly more than $1 billion in payments. According to the state's Workers' Compensation Institute, California paid 15% of the nation's total workers' comp benefits, despite the fact that its maximum weekly benefit is 30% below the national average – $281.

In 1962, there was one award of a million dollars. In 1984, there were 201 awards of $1 million or more in the U.S. vs. 372 such awards in 1983.

The average size of jury awards for the three most common injuries in workers' compensation insurance claims – cervical strain, knee injuries and vertebrae fractures – and for "wrongful" deaths of adult males increased an average of 14.3% between 1974 and 1984, more than double the inflation rate.

working on *something*. We may even use the services of a private investigator to find out if he could be back on the job."

"We require a complete physical and back X-ray" says Stewart. "Where we're allowed, we'll give a polygraph test to help determine whether the applicant is trying to cover up previous injury compensation."

A Carolina employee has good reason to avoid being injured. "If it is determined that an accident was avoidable," says Stewart, "a letter of reprimand goes into the worker's file and stays there for nine months." Accumulated letters can be used to support disciplinary action.

There are also positive incentives to promote safety at Carolina. Accident-free workers for four-week periods are entered in a sweepstakes drawing for a 36-in. color TV. That may sound expensive, but according to Stewart, it's nothing compared to the cost of long-term disability claims.

"Incentives pay," Merchants says.

Merchants Fast Motor Lines, of Dallas, Tex., is fighting the high cost of worker's comp claims with safety incentives, according to Ed Forkerway, supervisor of safety and training. For example, workers who remain accident-free for three years are given a $50 U.S. Savings Bond for each additional year they retain their accident-free status.

There are also periodic, in-terminal safety competitions. Winning employees and their spouses are treated to a sumptuous dinner. According to Forkerway, the competition has been getting keener and "injuries are down 7% to 8% from last year."

"It's just too easy to collect workers' compensation," says Norm Young, vice president of insurance for Krobin Refrigerated Xpress, Tulsa, Okla. "The first time a worker has an injury, you teach him to collect. The second time, he'll teach you."

Becoming self-insured helped Krobin stay closer to the compensation process. And there are safety award programs.

"The most important thing," says Young, "is to make sure you've got a good relationship with your employees. That means, among other things, making sure there are no delays for legitimate claims. Show employees you care about them and their families. If they have any sense of loyalty, they'll want to come back to work." □

The $29,000 leg

Do you have any idea what it costs a company when an employee breaks a leg while on the job? Although a broken leg is a relatively minor injury, E.I. duPont has found that an on-the-job accident that results in a leg fracture incurs costs that add up to more than $29,000.

Half that total represents direct costs, including: payment for partial disability, $11,000; wages for lost time, $1000; on-site medical care, $350; ambulance service, $50; three days' hospital care, $1000; physicians' fees, $750; legal reports, $300; transportation and miscellaneous costs, $100.

Indirect costs are less apparent. They include: time devoted to accident investigations, reports and analysis by supervisory and safety personnel; replacement or repair of damaged equipment and property; productivity decreases; and profit losses.

For a free single copy of this article, write on company letterhead to: Editor, Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089.

Comparison of Average Costs Per Workers' Compensation Claims*

State	Truck Classification	All Classifications
Alabama	$4,521	$1,534
Alaska	12,586	4,617
Arizona	3,322	1,730
Arkansas	6,863	1,891
Colorado	3,922	2,683
Connecticut	4,881	2,068
Dist. of Col.	18,103	6,157
Florida	7,201	2,373
Georgia	3,459	1,390
Hawaii	9,034	4,708
Idaho	5,213	1,726
Illinois	6,780	2,377
Indiana	2,285	779
Iowa	5,524	1,606
Kansas	4,109	1,642
Kentucky	5,706	1,820
Maine	13,178	5,162
Maryland	5,545	2,720
Michigan	5,789	2,232
Minnesota	12,503	4,296
Mississippi	3,171	1,398
Montana	12,930	4,002
Nebraska	3,421	1,249
New Hampshire	5,857	2,228
New Mexico	5,531	2,961
North Carolina	3,357	891
Oklahoma	6,301	2,444
Oregon	4,800	2,606
Rhode Island	5,458	4,049
South Carolina	3,815	1,431
South Dakota	4,150	1,318
Tennessee	2,574	1,085
Utah	2,736	1,020
Vermont	3,736	1,830
Virginia	3,589	1,669
Wisconsin	3,528	1,605
Total 36 States	4,879	2,167

* – Information provided by National Council on Compensation Insurance, based on a survey of 36 states.

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REGS MAY COST MILLIONS

Tank truck operators and tanker manufacturers are in a conflict with the Department of Transportation over proposed regulations that could cost them millions of dollars and require a dual-vent device that doesn't exist—and if it were invented, would create possibilities for spills or explosions. In response to the proposal, the National Tank Truck Carriers, calls the rulemaking proposal "seriously flawed."... 16

1985's TOP 100

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THE TOP 100

CCJ's exclusive Top 100 lists the nation's highest revenue-producing for-hire carriers. Top 100 data includes charts ranking carriers by fleet size and cost-per-linehaul-mile. Analysis of the statistics reveals that the largest carriers' net profits declined, while revenues were at record highs.......... 62

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The Teamsters' first convention since 1981 shows that the more things change, the more they stay the same. Despite deregulation's negative impact on membership, the IBT's perception of right and wrong is unchanged......... 128

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1985's TOP 100

REVENUES UP BUT PROFITS DOWN IN '85

For-hire motor carriers continued to battle for profitability in 1985, despite record setting revenues. As the figures for this year show, big LTL carriers continue to get bigger while smaller truck load operators continue to nip away at their heels, like dogs chasing after circus elephants.

By **CARL GLINES**, *Executive Editor*, and
EILEEN NASE, *Directories/Special Projects*

Ravaged by unprecedented insurance costs and beset by problems directly related to five years of deregulation, such as wide-spread discounting and an influx of cheap, under-capitalized new entries, the industry's leading for-hire truckload and LTL carriers fought hard in 1985 to maintain profitability amid soaring revenues.

A close examination of the statistical data for 1985 for the nation's largest motor carriers—data exclusively accumulated and compiled by American Trucking Associations for *Commercial Carrier Journal*—shows a two-year decline in net profits after taxes while gross revenues continued to set new industry records. At the bottom end of the Top 100 category, we see widespread changes occurring as smaller carriers begin to take advantage of a free and open market, carving out special niches for themselves at the expense of the more regulated-oriented companies which have been too slow to react to shipper demands.

What we see in the Top 50 today is a pattern established several years ago that continues to run true to form. In most cases, carriers which lost money in previous years continue to lose, some at alarming rates. One of the worst case scenarios in this instance is P.I.E. Nationwide of Jacksonville, Fla., formerly known as Ryder/P.I.E. Nationwide.

In 1985, P.I.E. Nationwide lost a staggering $96.7 million on revenues of $673 million, and the company's return on equity was a negative 436.7%, second only to Pilot Freight Carriers of Winston-Salem, N.C., where the return on equity was 627.0%.

Adding in P.I.E.'s losses for 1984, the company has lost $116.4 million

Continued

RANK BY FLEET SIZE

FLEET SIZE RANK	GROSS REVENUE RANK	COMPANY NAME	NUMBER OF VEHICLES
1	1	United Parcel Svc Inc	56,432
2	3	Roadway Express Inc	30,288
3	5	Consolidated Frtways of De	28,740
4	4	Yellow Freight System Inc	28,494
5	2	United Parcel Svc Inc NY	18,093
6	7	P * I * E * Nationwide Inc	17,489
7	6	North American Van Lines Inc	17,179
8	8	Overnite Trptn Co	12,543
9	9	A B F Freight Systems Inc	11,111
10	22	Signal Dlvy Service Inc	9,110
11	10	Carolina Frt Crrs Corp	8,784
12	17	American Frt System Inc	7,102
13	14	Smith's Transfer Corp	7,022
14	12	Allied Van Lines Inc	6,853
15	18	Preston Trucking Co Inc	6,741
16	25	Central Freight Lns Inc	6,731
17	11	Anchor Motor Freight Inc	6,598
18	13	United Van Lines Inc	5,355
19	15	Transcon Lines	5,302
20	24	Matlack Inc	5,139
21	16	Aero Mayflower Trst Co Inc	4,898
22	31	Bowman Trptn Inc	4,859
23	26	Associated Truck Lns Inc	4,708
24	27	Brown Transport Corp	4,610
25	30	Jones Truck Lines Inc	4,274
26	47	Builders Transport Inc	4,225
27	19	Complete Auto Transit Inc	4,087
28	34	Chemical Leaman Tank Lns	3,963
29	37	J B Hunt Transport Inc	3,959
30	32	Garrett Freightlines Inc	3,912
31	41	C W Transport Inc	3,804
32	99	Anderson Trucking Svc Inc	3,643
33	28	Pilot Freight Carriers Inc	3,614
34	29	Commercial Carriers Inc	3,472
35	36	Thurston Motor Lines Inc	3,345
36	45	Old Dominion Frt Line Inc	3,178
37	44	Tri-State Mtr Transit Co	3,177
38	33	Atlas Van Lines Inc	3,139
39	80	Jones Transfer Company	2,626
40	56	Overland Express Inc	2,494
41	40	Jack Cooper Trpt Co	2,478
42	38	Viking Freight System Inc	2,429
43	60	Transus Inc	2,404
44	85	Estes Express Lines	2,209
45	54	M & G Convoy Inc	2,146
46	52	Milne Truck Lines Inc	2,094
47	51	Midwestern Distb Inc	2,081
48	68	Southeastern Frt Lns Inc	2,069
49	61	Churchill Truck Lines Inc	2,035
50	46	Red Star Exp Lns-Auburn Inc	1,930
51	72	Werner Enterprises Inc	1,889
52	48	Holland Motor Exp Inc	1,846
53	77	Graves Truck Line Inc	1,820
54	50	National Freight Inc	1,816
55	43	Nu-Car Carriers Inc	1,810
56	21	St. Johnsbury Trkg Co Inc	1,776
57	91	Hyman Freightways Inc	1,773
58	98	Duff Truck Line Inc	1,678
59	88	Dart Transit Company	1,586
60	86	Southwest Motor Freight	1,577
61	73	AAA Cooper Trptn	1,551
62	81	Contract Freighters Inc	1,551
63	93	Holmes Transportation Inc	1,522
64	71	New Penn Mtr Express Inc	1,480
65	62	Burnham Service Co Inc	1,453
66	75	Matador Service Inc	1,426
67	39	Interstate Cont Carr Corp	1,408
68	53	A-P-A Transport Corp	1,373
69	76	Mistletoe Express Service	1,362
70	89	Groendyke Transport Inc	1,344
71	94	Miller Transporters Inc	1,330
72	65	Crete Carrier Corp	1,313
73	55	Jones Motor Co Inc	1,272
74	58	Pacific Mtr Trkg Co	1,186
75	84	Auto Convoy Co	1,164
76	78	Advance Transportation Co	1,123
77	100	Lyons Trptn Lines Inc	1,103
78	49	The Motor Convoy Inc	1,055
79	64	F F E Trptn Svc Inc	1,045
80	95	Stoops Express Inc	1,031
81	23	Bekins Van Lines Co	1,000
82	79	Midwest Coast Trpt Inc	990
83	70	D P D Inc	942
84	96	Saia Motor Frt Line Inc	908
85	20	Central Transport Inc	889
86	87	Janesville Auto Trpt Co	880
87	83	Pauls Trucking Corp	850
88	90	Pre-Fab Transit Co	809
89	97	Kenosha Auto Trpt Corp	807
90	82	Cassens Transport Co	755
91	67	Campbell Sixty-Six Exp Inc	692
92	74	Global Van Lines Inc	625
93	42	Watkins Motor Lines Inc	617
94	57	Northwest Trpt Svc Inc	574
95	92	Mercer Transportation Co	420
96	59	Merchants Fast Mtr Lines	290
97	63	E & L Transport Co	98
*	35	Hall's Motor Transit Co	0
*	66	Murphy Mtr Frt Lns Inc	0
*	69	Pennsylvania Trk Lns Inc	0

* Halls, Murphy and Pennsylvania Truck Lines did not report total vehicles.

in just eight quarters of operations. Spun off by the parent, IU International of Philadelphia, Pa., the company is now owned by Maxitron and operated by Morton Huff, Maxitron's largest shareholder. Huff took control in early 1986 following a dispute over policy with Jack E. Schang, who was chairman and president. Huff has no experience in trucking, but instead has been closely associated with some of the country's largest department store chains. Earlier this year he predicted a modest profit for P.I.E. Nationwide in 1986, saying running a truck line wasn't much different than operating a department store.

UPS' growth

The two United Parcel Service divisions, the largest in St. Charles, Ill., and the second in New York, again enjoyed significant growth in both gross revenues and net income after taxes. For the number one carrier, UPS of St. Charles, revenues soared to $4.8 billion and net profit after taxes jumped to $298 million, an increase over '84 of $47.9 million. No other motor carrier, including UPS of New York, comes close to the figures produced by the number one company. Significantly, the figures produced for both UPS divisions reflect labor costs nego-

Text continues on page 72

Rank '85	Rank '84	Fleet Name, City, State	Type	Financial Data ($000) Gross Revenue	Expenses	Net Income After Taxes	Net Profit Margin %	Return on Equity %	Current Ratio (Assets: Liabilities)	Long Term Debt to Equity Ratio
1	1	UNITED PARCEL SVC INC, ST CHARLES, IL	CMGF	$4898303	$4361577	$298924	6.1	40.6	1.23	0.00
2	2	UNITED PARCEL SVC INC NY, NEW YORK, NY	CMGF	1873005	1734976	69199	3.7	21.6	1.48	0.00
3	3	ROADWAY EXPRESS INC, AKRON, OH	CMGF	1428750	1300440	92306	6.5	11.0	0.81	0.00
4	4	YELLOW FREIGHT SYSTEM INC, OVERLAND PARK, KS	CMGF	1407091	1309763	55999	4.0	16.9	0.80	0.37
5	5	CONSOLIDATED FRTWAYS OF DE, PORTLAND, OR	CMGF	1329571	1235835	59415	4.5	14.2	1.17	0.16
6	7	NORTH AMERICAN VAN LINES INC, FORT WAYNE, IN	CMHG	680120	664864	24620	3.6	13.3	1.38	0.91
7	6	P * I * E * NATIONWIDE INC, JACKSONVILLE, FL	CMGF	673676	756774	96765-	14.4-	436.7-	0.87	2.94
8	9	OVERNITE TRPTN CO, RICHMOND, VA	CMGF	469695	398382	39017	8.3	18.2	2.19	0.01
9	10	A B F FREIGHT SYSTEMS INC, FORT SMITH, AR	CMGF	418961	400396	9882	2.4	33.4	0.68	2.04
10	11	CAROLINA FRT CRRS CORP, CHERRYVILLE, NC	CMGF	411911	381661	14994	3.6	21.5	1.35	0.67
11	16	ANCHOR MOTOR FREIGHT INC, BIRMINGHAM, MI	CTMV	408309	376091	20622	5.1	38.0	0.55	0.61
12	12	ALLIED VAN LINES INC, BROADVIEW, IL	CMHG	369747	368829	4748	1.3	3.9	1.01	0.20
13	13	UNITED VAN LINES INC, FENTON, MO	CMHG	366613	363381	3044	0.8	7.4	1.93	0.68
14	14	SMITH'S TRANSFER CORP, STAUNTON, VA	CMGF	354889	363728	7976-	2.2-	43.0-	0.82	3.68
15	15	TRANSCON LINES, EL SEGUNDO, CA	CMGF	323502	314144	637	0.2	1.6	1.17	0.26
16	19	AERO MAYFLOWER TRST CO INC, CARMEL, IN	CMHG	302796	290055	7377	2.4	16.6	1.28	0.36
17	17	AMERICAN FRT SYSTEM INC, OVERLAND PARK, KS	CMGF	302221	298277	2777	0.9	10.1	0.74	0.26
18	18	PRESTON TRUCKING CO INC, PRESTON, MD	CMGF	280533	275904	3493	1.2	3.6	1.79	0.15
19	21	COMPLETE AUTO TRANSIT INC, BLOOMFIELD HILLS, MI	CTMV	255772	232543	12559	4.9	23.5	0.84	0.28
20	20	CENTRAL TRANSPORT INC, STERLING HEIGHTS, MI	CMGF	244752	236566	1050	0.4	15.3	1.62	0.04
21	22	ST JOHNSBURY TRKG CO INC, HOLLISTON, MA	CMGF	227810	210663	8171	3.6	18.6	1.22	0.26
22	23	SIGNAL DLVY SERVICE INC, DOWNERS GROVE, IL	CTRS	206894	192467	8201	4.0	16.7	1.02	0.46
23	26	BEKINS VAN LINES CO, HILLSIDE, IL	CMHG	202297	200753	1479	0.7	4.5	1.94	0.08
24	24	MATLACK INC, LANSDOWNE, PA	CMLP	200243	203539	5118-	2.6-	16.3-	1.23	1.69
25	29	CENTRAL FREIGHT LNS INC, WACO, TX	CMGF	193808	189005	6496	3.4	4.2	1.92	0.47
26	27	ASSOCIATED TRUCK LNS INC, DENVER, CO	CMGF	183333	186774	4458-	2.4-	N.V.	2.15	N.V.
27	32	BROWN TRANSPORT CORP, ELBERTON, GA	CMGF	182153	179660	1052-	0.6-	12.3-	0.96	4.02
28	25	PILOT FREIGHT CARRIERS INC, WINSTON SALEM, NC	CMGF	180600	192607	13890-	7.7-	627.0-	0.87	11.29
29	33	COMMERCIAL CARRIERS INC, SOUTHFIELD, MI	CMMV	176264	166143	4534	2.6	14.5	0.82	0.27
30	37	JONES TRUCK LINES INC, SPRINGDALE, AR	CMGF	166647	156518	5430	3.3	8.5	1.41	0.00
31	35	BOWMAN TRPTN INC, ATLANTA, GA	CMGF	166418	166134	508	0.3	1.0	2.24	0.04
32	31	GARRETT FREIGHTLINES INC, DENVER, CO	CMGF	166256	169015	3750-	2.3-	28.2-	1.02	0.77
33	34	ATLAS VAN LINES INC, EVANSVILLE, IN	CMHG	162996	154097	1068-	0.7-	10.6-	0.72	4.13
34	36	CHEMICAL LEAMAN TANK LNS, EXTON, PA	CMLP	160944	156827	1476	0.9	4.9	0.95	0.97
35	30	HALL'S MOTOR TRANSIT CO, MECHANICSBURG, PA	CMGF	158797	167505	12476-	7.9-	302.1-	0.73	6.26
36	44	THURSTON MOTOR LINES INC, CHARLOTTE, NC	CMGF	136572	138292	2827	2.1-	13.0-	1.93	1.09
37	49	J B HUNT TRANSPORT INC, LOWELL, AR	CMGF	131475	106817	16314	12.4	21.2	1.78	0.71
38	47	VIKING FREIGHT SYSTEM INC, SANTA CLARA, CA	CMGF	130315	123121	3156	2.4	7.8	1.74	0.27
39	75	INTERSTATE CONT CARR CORP, SALT LAKE CITY, UT	CMGF	129518	133387	1286	1.0-	3.0-	0.75	0.13
40	38	JACK COOPER TRPT CO, KANSAS CITY, MO	CMMV	125392	111607	4351	3.5	10.8	0.68	0.48
41	40	C W TRANSPORT INC, WISCONSIN RAPIDS, WI	CMGF	125033	124587	1715	1.4	1.1	1.50	0.36
42	42	WATKINS MOTOR LINES INC, LAKELAND, FL	CMGF	118482	111012	3738	3.2	21.2	2.24	0.08
43	43	NU-CAR CARRIERS INC, BRYN MAWR, PA	CMMV	116605	110837	2027	1.7	18.4	1.10	1.32
44	45	TRI-STATE MTR TRANSIT CO, JOPLIN, MO	CMHM	114543	114979	1214-	1.1-	6.4-	1.66	0.86
45	41	OLD DOMINION FRT LINE INC, HIGH POINT, NC	CMGF	112790	112028	2847-	2.5-	22.9-	1.01	3.82
46	51	RED STAR EXP LNS AUBURN INC, AUBURN, NY	CMGF	112352	100998	10563	9.4	28.0	1.87	0.38
47	66	BUILDERS TRANSPORT INC, CAMDEN, SC	CTBM	107720	93590	7267	6.7	25.9	0.94	2.26
48	56	HOLLAND MOTOR EXP INC, HOLLAND, MI	CMGF	106643	94210	7213	6.8	17.3	1.56	0.01
49	55	THE MOTOR CONVOY INC, DECATUR, GA	CMMV	104385	103357	380	0.4	6.7	1.04	0.73
50	58	NATIONAL FREIGHT INC, VINELAND, NJ	CMGF	103390	101976	4889	4.7	4.6	1.19	0.03
		Totals for Top 50		21310892	20036691	663844	3.1	14.7	1.15	0.30

TOTAL TOP 50 – 1985	$21,310,892	$20,036,691	$663,844
TOTAL TOP 50 – 1984	20,936,173	19,750,700	677,193
TOTAL TOP 50 – 1983	19,110,700	17,860,772	695,320

Equipment Owned & Leased					Maintenance Expenses ($000)								Insurance Expenses ($000)		
Trucks	Truck-Tractors	Trailers	Total Owned	Vehicles Leased/ Rented	Tires & Tubes	Fuel	Lubes & Coolant	Repair Parts	Purch. Maint.	Other	Maint. Total	Maint. Cost/ Mile	Public Liab. & Prop. Damage	Cargo Loss & Damage	Fire Theft & Col
30652	4617	20733	56002	430	$27842	$118708	$3593	$79626	$35287	$85672	$350728	$0.36*	$21526	$39269	$54
11678	1897	4453	18028	65	8761	39333	1332	30065	9833	36887	126211		8326	23282	20
636	8000	21640	30276	12	4945	70688	1419	11872	17797	26278	132998	0.32	9238	20343	58
427	7250	20771	28448	46	12152	74287	1945	17123	11142	32420	149069	0.36	7768	25269	29
191	7017	21506	28714	26	11616	70236	1497	19979	11015	28337	142680	0.35	5947	21608	4070
69	180	8903	9152	8027	1901	1106	NA	3	3944	336	7291	NA	65	0	187
737	4242	12510	17489	0	7715	45463	843	9246	11719	9136	84121	0.38	5613	12926	0
167	3686	8690	12543	0	6732	33998	982	10764	4023	7928	64427	0.36	2903	6910	0
169	1836	8630	10635	476	2669	25411	794	4568	4981	3836	42257	0.27	2265	4789	268
146	2261	6191	8598	186	2896	18199	614	5844	3057	7245	37854	0.38	3347	4468	87
0	3373	3225	6598	0	8541	41063	906	11201	8476	6228	76415	0.43	6340	9280	7
0	78	295	373	6480	205	0	NA	0	491	305	1000	NA	102	0	48
0	0	166	166	5189	100	0	NA	0	209	424	733	NA	0	140	0
263	2182	4187	6632	390	3349	20137	530	4489	1716	4758	34981	0.28	1815	5077	50
93	1382	3827	5302	0	2782	18527	537	5146	4103	6444	37538	0.39	3038	4254	687
0	0	1402	1402	3496	56	43	NA	540	698	477	1813	NA	324	607	0
41	1452	5509	7002	100	2610	13553	448	4569	3054	2779	27014	0.31	1491	3661	0
39	1804	4898	6741	0	3306	12242	492	5320	2340	7100	30799	0.44	1962	2873	22
1998	0	2089	4087	0	4798	19911	443	7496	4143	8452	45244	0.41	2488	5020	14
0	0	0	0	889	25	2397	0	6	17	1285	3730	N.V.	2044	1652	5
0	383	395	778	998	2506	9327	430	2490	1866	4280	20900	0.48	1230	2428	0
19	1549	7542	9110	0	3812	18122	366	3492	2935	1608	30335	0.26	1525	13	513
0	1	999	1000	0	1128	0	NA	0	875	550	2553	NA	0	0	0
70	957	3463	4490	649	4071	12202	274	4285	4304	10284	35420	0.47	9572	386	0
965	1599	4167	6731	0	2154	10283	172	4583	291	2726	20209	0.41	1884	2066	1
25	1200	3273	4498	210	519	8181	399	3882	2170	2770	17920	0.43	1288	2818	5
253	1295	3062	4610	0	1698	10641	384	3138	1971	3202	21033	0.38	1325	3285	51
52	865	2403	3320	294	1679	9714	266	3432	3009	3481	21580	0.41	1973	1397	0
1439	0	1771	3210	262	2824	13556	522	6720	4060	3811	31493	0.46	2009	4694	0
0	1152	3122	4274	0	1817	8277	226	1582	691	3259	15851	0.40	1095	1775	0
216	1086	3287	4589	270	2866	10493	303	3235	1594	2436	20926	0.39	1195	2147	0
115	971	2744	3830	82	1509	8981	243	2383	2717	2095	17928	0.41	569	1842	74
0	0	103	103	3036	81	5	NA	0	271	207	565	N.V.	145	1988	3
0	627	2700	3327	636	3287	10756	359	3504	3571	7752	29229	0.43	3255	195	519
0	0	0	0	0	0	0	0	0	0	0	20203	0.51	0	0	0
283	588	2248	3119	226	2014	8542	193	2867	719	2292	16627	0.34	1871	2283	0
0	1290	2669	3959	0	0	0	0	0	0	0	28940	NA	0	0	0
38	493	1898	2429	0	1024	6174	141	2147	281	1208	10976	0.39	1939	1483	173
0	4	99	103	1305	2035	331	6	1128	50	3612	7162	N.V.	2557	1165	1631
0	1206	1272	2478	0	3530	12607	275	6183	1515	4242	28352	0.45	1280	2069	0
16	1007	2727	3750	54	1515	6745	247	1890	818	2531	13746	0.43	949	953	10
19	208	71	298	319	1119	2560	55	794	1335	1591	7455	0.45	2011	881	264
0	802	900	1702	108	1609	7812	135	3322	2108	3744	18730	0.44	1519	4933	8
25	240	2252	2517	660	1461	2172	116	1672	125	3717	9262	0.85	4431	1156	1015
17	610	2395	3022	156	1754	6790	248	2346	1334	3631	16103	0.46	2414	1859	1
182	544	1204	1930	0	1233	4681	85	1568	662	2960	11189	0.74	693	894	21
0	1434	2791	4225	0	794	16525	297	2355	734	2038	22743	0.19	2307	318	0
7	660	1179	1846	0	1013	5191	430	1626	1490	2062	11812	0.44	757	506	33
0	83	86	169	886	2069	8695	290	2529	2079	2213	17875	0.45	2083	3089	0
0	41	414	455	1361	1618	2206	194	1435	1087	1447	7988	N.V.	1307	973	0
51047	72152	220861	344060	37324	165740	846871	23031	302445	182707	362076	1932008	0.38	139137	239024	9912

NA = Not applicable or not available.
N.V. = Not valid (e.g. negative income divided by negative equity, or low maintenance cost for high mileage).
* = combined totals for UPS-Illinois and UPS-New York
T = Tie and operating ratio for 1985
Maintenance cost per mile = total maintenance expense divided by sum of vehicle miles in owned vehicles + vehicles rented without driver

Vehicle Mileage (000)				Avg. Haul (Miles)	Linehaul Cost/Mi	Tons Carried (000)		Shipments Number (000)		Avg. Load (Tons)	1985 Oper. Ratio	1984 Oper. Ratio	Rank By Oper. Ratio	Abbr. Fleet Name
Owned	Leased With Driver	Leased Without Driver	Inter-Modal			TL	LTL	TL	LTL					
1032368*	0	35103*	0	NA*	$2.71*	0	11259*	NA	NA	NA*	89.0	89.5	14	UPS-ILL
	0		0			0		NA	NA		92.6	94.7	24	UPS-NY
411044	1329	J	21551	1142	1.21	1504	4071	147	11157	14.7	S1.0	90.4	20	ROADWAY
417384	246	0	8227	1194	1.12	1063	4029	118	10683	14.3	93.1	94.8	28	YELLOW FRT
410061	8698	29	17336	1404	1.21	1340	3640	135	9079	16.0	92.9	92.7	26	CONSOLIDATED
0	157458	0	0	1117	1.82	676	NA	272	NA	4.8	97.8	95.7	56	NORTH AMERICAN VAN
219003	0	0	12023	1201	1.23	831	1849	87	4653	13.9	112.3	103.0	100	PIE NATIONWIDE
180958	0	0	0	575	0.83	1422	2038	114	4775	11.0	84.8	85.8	6	OVERNITE TRPTN
152032	2795	1665	699	1118	1.00	624	1268	60	2907	13.4	95.6	96.0	39	ABF FREIGHT
100487	14239	271	13157	684	1.17	903	1435	74	3322	12.1	92.7	93.2	25	CAROLINA FRT
175676	0	2375	0	284	1.50	5414	NA	NA	NA	8.6	92.1	93.8	22	ANCHOR
0	129671	0	0	982	2.11	618	NA	264	NA	4.7	99.8	97.9	79	ALLIED VAN
0	119307	0	0	1137	2.13	591	NA	241	NA	5.6	99.1	100.3	71	UNITED VAN
125144	0	0	3957	805	1.02	767	1326	67	3192	13.1	102.5	98.4	91	SMITH'S TRF
97422	32026	0	554	1244	1.09	974	756	83	1876	16.6	97.1	94.0	51	TRANSCON
0	114143	0	0	1272	1.73	474	NA	179	NA	5.3	95.8	94.4	41	AERO MAYFLOWER
67386	1955	19195	5150	634	1.21	592	1125	47	2703	11.5	98.7	97.7	64	AMERICAN FRT
55999	1632	13362	7773	420	1.38	1078	1122	86	2537	11.4	98.4	96.1	59	PRESTON
109243	10844	0	0	341	1.54	2931	NA	NA	NA	8.3	90.9	90.8	19	COMPLETE AUTO
0	15391	121467	0	138	1.13	130	1321	284	1982	5.3	96.7	97.3	49	CENTRAL TRPT
0	0	43894	0	279	1.08	441	1049	40	2975	9.5	92.5	94.0	23	ST JOHNSBURY
118117	0	0	0	349	1.37	3125	NA	NA	NA	9.2	93.0	94.3	27	SIGNAL
0	67880	0	0	1117	2.07	324	NA	169	NA	5.3	99.2	96.8	73	BEKINS VAN
71938	30910	3308	0	181	1.63	7830	NA	NA	NA	13.3	101.6	95.8	88	MATLACK
67	0	49277	270	176	1.12	1136	1266	74	3498	8.5	97.5	95.5	54	CENTRAL FRT
34332	0	7231	6934	293	1.44	862	946	65	2360	10.5	101.9	107.0	90	ASSOCIATED
55004	30667	0	0	465	0.95	1679	653	115	1404	12.6	98.6	97.7	T 62	BROWN TRPT
52349	111	0	659	532	1.15	391	757	38	1759	11.5	106.6	104.8	97	PILOT
62692	7139	5649	0	147	1.92	2937	NA	NA	NA	5.7	94.3	94.5	32	COMMERCIAL
39407	0	0	67	254	1.30	283	852	28	1991	7.3	93.9	92.5	30	JONES TRUCK
54187	24668	0	1446	679	0.97	1127	560	75	1309	14.3	99.8	98.2	81	BOWMAN TRPTN
43867	0	0	4994	658	1.34	391	688	31	2023	13.5	101.7	102.4	89	GARRETT
70	57616	0	0	1038	1.99	262	NA	90	NA	4.7	94.5	97.9	37	ATLAS VAN
67125	19643	1143	0	225	1.43	5446	NA	NA	NA	14.0	97.4	98.3	53	CHEMICAL LEAMAN
39896	0	0	2531	476	1.25	361	657	33	1552	11.2	105.5	104.1	95	HALL'S MOTOR
48927	0	0	0	443	0.95	665	602	52	1399	11.5	101.3	98.1	87	THURSTON
0	0	0	0	NA	NA	0	NA	NA	NA	0.0	81.2	75.4	1	J B HUNT
28009	0	0	0	326	1.14	185	485	17	1801	7.8	94.5	93.5	36	VIKING FRT
0	120347	820	0	1176	0.93	1343	NA	NA	NA	13.0	103.0	107.2	92	INTERSTATE CONT
63336	21	0	0	340	1.43	1703	NA	NA	NA	9.1	89.0	90.6	13	JACK COOPER
29016	1130	2895	298	367	1.49	526	610	46	973	12.2	99.6	98.8	78	C W TRANSPORT
16547	40257	0	0	1546	0.83	137	313	13	696	12.3	93.7	95.8	29	WATKINS
36157	0	6228	0	160	2.11	2149	NA	NA	NA	8.1	95.1	93.0	38	NU-CAR
10890	82746	0	0	1110	1.02	943	NA	NA	NA	11.2	100.4	99.0	83	TRI-STATE
34256	15698	1065	0	413	1.07	925	456	63	889	11.2	99.3	99.7	75	OLD DOMINION
15060	101	0	0	200	1.36	111	517	13	1284	8.3	89.9	90.2	17	RED STAR EXP
117666	0	0	0	356	0.70	4020	NA	NA	NA	12.2	86.9	89.1	9	BUILDERS TRPT
27016	0	0	0	226	1.01	306	619	29	1224	7.7	88.3	89.0	12	HOLLAND
3320	0	36533	0	144	1.88	3951	NA	NA	NA	12.9	99.0	97.1	69	MOTOR CONVOY
5622	58265	0	0	341	1.35	874	141	158	37	5.4	98.6	98.7	T 62	NATIONAL FRT
4629080	1166933	464100	107626	563	1.59	66365	46410	3407	86040	11.3	94.0	94.1		

For Top 100 listings under "Type": BM – building materials; CM – common; CT – contracts; GF – general freight; ED – explosives/dangerous articles; FP – forest products; HG – household goods; HM – heavy machinery; LP – liquid petroleum products (including, in most cases, other bulk commodities); MV – motor vehicles; RS – retail store delivery; SC – specific commodity not otherwise grouped

Rank '85 '84	Fleet Name, City, State	Type	Financial Data (x000) Gross Revenue	Expenses	Net Income After Taxes	Net Profit Margin %	Return on Equity %	Current Ratio (Assets/Liabilities)	[illegible]
51 39	MIDWESTERN DISTB INC, FORT SCOTT, KS	CMSC	$99995	$110008	$6465-	6.5-	74.3-	1.54	1.91
52 48	MILNE TRUCK LINES INC, PLEASANTON, CA	CMGF	99663	98941	127-	0.1-	0.5-	0.90	0.10
53 50	A-P-A TRANSPORT CORP, NORTH BERGEN, NJ	CMGF	98599	82579	7400	7.5	30.9	1.05	0.08
54 57	M & G CONVOY INC, BUFFALO, NY	CMMV	98485	95076	2699	2.7	19.2	0.85	0.61
55 69	JONES MOTOR CO INC, SPRING CITY, PA	CMGF	98352	96471	2018	2.1	36.0	1.63	0.09
56 62	OVERLAND EXPRESS INC, INDIANAPOLIS, IN	CMGF	96157	92758	1960-	2.0-	16.0-	0.65	2.21
57 64	NORTHWEST TRPT SVC INC, COMMERCE CITY, CO	CMGF	95773	82925	7607	7.9	23.2	2.49	0.00
58 46	PACIFIC MTR TRKG CO, BURLINGAME, CA	CMGF	95460	94721	487	0.5	N.V.	0.52	N.V.
59 54	MERCHANTS FAST MTR LINES, ABILENE, TX	CMGF	92691	91549	275	0.3	2.2	1.91	0.00
60 53	TRANSUS INC, ATLANTA, GA	CMGF	90244	88907	1572	1.7	6.1	2.06	0.05
61 61	CHURCHILL TRUCK LINES INC, CHILLICOTHE, MO	CMGF	90133	86692	2129	2.4	13.5	1.37	0.17
62 71	BURNHAM SERVICE CO INC, COLUMBUS, GA	CMHG	88084	79276	3793	4.3	15.3	0.99	0.29
63 70	E & L TRANSPORT CO, WOODHAVEN, MI	CMMV	86272	82807	2144	2.5	32.4	1.35	0.00
64 87	F F E TRPTN SVCS INC, DALLAS, TX	CMRC	86112	87026	255	0.3	6.9-	1.68	1.61
65 73	CRETE CARRIER CORP, LINCOLN, NE	CMGF	83092	79569	2773	3.3	16.2	3.20	0.00
66 52	MURPHY MTR FRT LNS INC, ST PAUL, MN	CMGF	82112	86485	5813-	7.1-	175.5-	0.38	0.57
67 59	CAMPBELL SIXTY SIX EXP INC, SPRINGFIELD, MO	CMGF	80379	86999	6449-	8.0-	147.8-	0.86	0.06
68 79	SOUTHEASTERN FRT LNS INC, COLUMBIA, SC	CMGF	77085	69096	7500	9.7	42.1	1.40	0.09
69 80	PENNSYLVANIA TRK LNS INC, WYNNEWOOD, PA	CMGF	75355	72601	2079	2.8	26.0	1.24	1.43
70 114	D P D INC, MIAMI, FL	CTSC	75191	65250	39	0.1	0.3	1.14	0.52
71 84	NEW PENN MTR EXPRESS INC, LEBANON, PA	CMGF	74647	61890	7465	10.0	21.7	0.95	0.04
72 106	WERNER ENTERPRISES INC, OMAHA, NE	CMBM	73696	61194	5680	7.7	32.3	0.67	1.02
73 83	AAA COOPER TRPTN, DOTHAN, AL	CMGF	71963	64165	4514	6.3	21.7	1.46	0.41
74 65	GLOBAL VAN LINES INC, ORANGE, CA	CMHG	71538	71449	583-	0.8-	267.6-	1.09	40.62
75 85	MATADOR SERVICE INC, WICHITA, KS	CMSC	71215	59867	6273	8.8	19.1	2.54	0.00
76 72	MISTLETOE EXPRESS SERVICE, OKLAHOMA CITY, OK	CMGF	70056	73125	820	1.2	7.1	1.39	1.02
77 76	GRAVES TRUCK LINE INC, DENVER, CO	CMGF	68166	65846	553	0.8	N.V.	0.97	N.V.
78 81	ADVANCE TRANSPORTATION CO, MILWAUKEE, WI	CMGF	67185	65638	317	0.5	8.5	0.78	1.90
79 90	MIDWEST COAST TRPT INC, SIOUX FALLS, SD	CMRC	66888	64205	1444	2.2	20.4	1.62	0.06
80 82	JONES TRANSFER COMPANY, MONROE, MI	CMGF	66629	64854	720	1.1	5.5	1.19	0.63
81 112	CONTRACT FREIGHTERS INC, JOPLIN, MO	CMSC	65822	62104	2101	3.2	34.0	0.93	2.74
82 77	CASSENS TRANSPORT CO, EDWARDSVILLE, IL	CMMV	65796	65501	121-	0.2-	4.3-	1.04	0.64
83 96	PAULS TRUCKING CORP, AVENEL, NJ	CTSC	65047	65834	165-	0.3-	4.5-	0.27	0.00
84 67	AUTO CONVOY CO, DALLAS, TX	CMMV	64749	64603	872-	1.3-	51.0-	0.96	1.97
85 95	ESTES EXPRESS LINES, RICHMOND, VA	CMGF	64481	56571	4198	6.5	19.3	2.30	0.06
86 91	SOUTHWEST MOTOR FREIGHT, CHATTANOOGA, TN	CMGF	64201	60593	108	0.2	5.0	0.68	7.96
87 93	JANESVILLE AUTO TRPT CO, BLOOMFIELD HILLS, MI	CTMV	62847	57352	3477	5.5	20.3	0.70	0.05
88 104	DART TRANSIT COMPANY, ST PAUL, MN	CMGF	62203	58685	2427	3.9	29.3	1.22	0.69
89 86	GROENDYKE TRANSPORT INC, ENID, OK	CMLP	61938	61260	253	0.4	1.0	1.24	0.57
90 97	PRE-FAB TRANSIT CO, FARMER CITY, IL	CMBM	60774	59879	706	1.2	12.5	2.59	0.01
91 121	HYMAN FREIGHTWAYS INC, ST PAUL, MN	CMGF	60208	59449	396	0.7	9.8	1.04	0.64
92 115	MERCER TRANSPORTATION CO, LOUISVILLE, KY	CMBM	60014	58093	1016	1.7	22.0	2.59	0.00
93 105	HOLMES TRANSPORTATION INC, FRAMINGHAM, MA	CMGF	59390	58639	665	1.1	4.0	1.46	0.00
94 99	MILLER TRANSPORTERS INC, JACKSON, MS	CMLP	58450	57335	223	0.4	3.7	0.93	1.09
95 128	STOOPS EXPRESS INC, ANDERSON, IN	CMSC	56993	53590	65	0.1	2.3	0.71	6.74
96 101	SAIA MOTOR FRT LINE INC, HOUMA, LA	CMGF	56986	49664	7267	12.8	29.6	2.42	0.00
97 89	KENOSHA AUTO TRPT CORP, KENOSHA, WI	CMMV	56518	57141	118	0.2	3.6-	0.85	0.39
98 98	DUFF TRUCK LINE INC, LIMA, OH	CMGF	55954	59152	2764-	4.9-	N.V.	0.71	N.V.
99 108	ANDERSON TRUCKING SVC INC, ST CLOUD, MN	CMSC	55903	55384	1909	3.4	17.5	1.32	0.33
100 107	LYONS TRPTN LINES INC, ERIE, PA	CMGF	55671	55304	13	0.0	0.1	2.01	0.37
	Totals for Top 100		25016054	23594793	734023	2.9	14.3	1.16	0.32

TOTAL TOP 100 – 1985	$25,016,054	$23,594,793	$734,023
TOTAL TOP 100 – 1984	24,613,472	23,266,398	782,831
TOTAL TOP 100 – 1983	22,584,324	21,192,330	765,075

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Equipment Owned & Leased					Maintenance Expenses (x000)								Insurance Expenses (x000)		
Trucks	Truck-Tractors	Trailers	Total Owned	Vehicles Leased/Rented	Tires & Tubes	Fuel	Lubes & Coolant	Repair Parts	Purch. Maint.	Other	Maint. Total	Maint. Cost/Mile	Public Liab. & Prop. Damage	Cargo Loss & Damage	Fire, Theft & Col
0	0	1471	1471	610	$876	0	0	$2	$393	$318	$1589	NA	$5046	$1028	$2849
97	505	1465	2067	27	959	$4385	$124	1193	1018	1117	8796	$0.43	742	1296	0
391	291	691	1373	0	647	2939	235	1578	622	2397	8418	0.62	708	922	69
940	0	1109	2049	97	1695	6308	338	3294	1803	3650	17087	0.56	1942	4193	1
0	0	1	1	1271	1	0	0	11	0	105	118	NA	1562	307	0
0	295	1580	1875	619	675	14336	256	738	620	801	17426	0.20	1270	536	0
0	0	0	0	574	459	4344	152	857	1365	1337	8515	0.34	425	491	555
310	192	474	976	210	1076	5303	118	1403	2291	3043	13233	0.68	1240	1296	0
0	0	0	0	290	1384	5589	143	1255	1474	744	10588	0.37	801	644	0
107	595	1462	2164	240	1004	3664	143	2505	1563	1237	10117	0.67	918	1080	39
58	595	1382	2035	0	1068	5130	146	1983	2584	1369	12280	0.51	159	733	40
238	242	544	1024	429	952	4567	NA	0	3204	1020	9744	0.27	922	166	143
0	0	0	0	98	873	5820	279	3062	2332	2276	14642	NA	810	1825	0
0	0	440	440	605	864	400	0	0	1672	1935	4871	NA	1964	1427	332
0	3	479	482	831	726	43	0	363	160	670	1962	NA	964	371	342
0	0	0	0	0	0	0	0	0	0	0	6686	0.34	0	0	0
27	343	114	484	208	751	4928	116	1003	522	1099	8418	0.36	765	811	51
88	695	1251	2034	35	1284	3972	141	2268	586	506	8758	0.37	979	871	224
0	0	0	0	0	0	0	0	0	0	0	10601	NA	0	0	0
150	27	160	337	605	89	7905	6	607	448	354	9409	0.22	791	245	452
55	402	1010	1467	13	967	3052	83	1350	790	1640	7882	0.57	831	575	0
0	567	1257	1824	65	0	8047	0	0	0	0	5656	0.08	0	0	0
53	407	1010	1470	81	1375	3528	123	762	259	541	6588	0.37	789	680	280
0	8	36	44	581	276	0	NA	0	465	0	741	NA	511	126	0
0	638	754	1392	34	1543	7239	485	5059	0	537	14862	0.43	281	281	0
288	259	815	1362	0	609	2485	56	909	730	691	5480	0.51	763	2014	5
32	500	1288	1820	0	678	3606	121	660	948	857	6869	0.46	246	753	12
10	195	652	857	266	410	2646	64	670	661	776	5226	0.37	1019	1040	157
0	2	457	459	531	328	57	0	0	245	179	809	N.V.	905	131	4
13	462	2137	2612	14	854	3546	118	1999	984	1519	9020	0.44	824	205	24
0	127	905	1032	519	230	755	25	516	161	1370	3056	N.V.	328	0	409
0	208	69	277	478	977	5868	144	1750	1383	2621	12744	0.40	755	2944	0
0	221	542	763	87	1237	5454	94	1158	608	3556	12108	0.41	438	548	0
0	310	450	760	404	881	5893	204	2151	1876	2062	13067	0.40	992	1885	0
76	643	1490	2209	0	1178	4133	120	1441	174	595	7640	0.45	661	446	19
0	156	1080	1236	341	408	10648	244	806	1261	1216	14584	0.34	1703	546	1051
442	0	438	880	0	762	4573	149	1708	732	1344	9264	0.38	592	1138	1
0	7	936	943	643	982	10	1	225	1410	1431	4059	NA	942	195	87
0	396	660	1056	288	1253	4123	122	1256	1012	1302	9069	0.19	4738	123	44
0	46	94	140	669	491	593	14	881	345	353	2677	N.V.	1452	531	116
26	245	1355	1626	147	785	1313	70	961	778	157	4063	0.24	354	675	16
0	0	0	0	420	0	0	0	0	0	378	378	NA	1687	409	9
74	410	1038	1522	0	471	2516	92	1393	309	1558	6341	0.38	465	576	44
0	584	691	1275	55	827	5008	168	2382	366	2142	10894	0.33	1663	103	30
0	240	535	775	256	1356	7289	230	0	2830	286	11992	0.40	529	171	444
1	158	478	637	271	845	2890	91	773	118	544	5262	0.38	445	756	0
0	75	732	807	0	421	3416	20	925	308	1357	6448	0.34	1230	1261	39
7	256	1120	1383	295	512	2411	81	1011	434	727	5176	0.52	402	769	42
9	147	2890	3046	597	1272	1718	40	443	195	939	4907	0.74	836	355	11
2	273	828	1103	0	510	2683	76	667	843	1245	6224	0.45	381	762	13
54541	83877	259231	397649	51128	203561	1032004	28259	356623	225589	417977	2328352	0.38	187907	277264	17806

NA = Not applicable or not available.
N.V. = Not valid (e.g. negative income divided by negative equity, or low maintenance cost for high mileage).
* = combined totals for UPS-Illinois and UPS-New York
T = Tie and operating ratio for 1985
Maintenance cost per mile = total maintenance expense divided by sum of vehicle miles in owned vehicles + vehicles rented without driver

Vehicle Mileage (000)														
Owned	Leased With Driver	Leased Without Driver	Inter-Modal	Ave. Haul (Miles)	Linehaul Cost/Mi	Tons Carried (000) TL	Tons Carried (000) LTL	Shipments Number (000) TL	Shipments Number (000) LTL	Ave. Load (Tons)	1985 Oper. Ratio	1984 Oper. Ratio	Rank By Oper. Ratio	Abbr. Fleet Name
0	79210	0	0	867	$1.20	1807	NA	NA	NA	19.8	110.0	105.2	99	MIDWESTERN
20066	3049	514	3584	573	1.38	221	383	22	1019	12.5	99.3	98.6	74	MILNE
13386	0	103	0	207	0.82	75	385	7	1277	7.0	83.8	79.5	4	A-P-A
30764	5050	0	0	181	2.24	1208	NA	NA	NA	6.1	96.5	97.0	47	M&G
0	16579	53787	0	524	1.19	1921	NA	NA	NA	14.3	98.1	97.6	57	JONES MOTOR
66744	0	18769	0	843	0.88	1522	0	101	0	15.0	96.5	90.1	46	OVERLAND
0	1808	24776	1017	1001	1.17	196	251	15	603	16.1	86.6	86.6	7	NORTHWEST
9206	560	10378	0	218	2.37	1235	NA	NA	NA	13.3	99.2	96.2	72	PACIFIC MTR
0	0	28973	0	342	1.13	504	469	32	1208	11.5	98.8	94.8	67	MERCHANTS FAST
15098	16312	0	3755	413	0.92	316	432	25	1118	7.1	98.5	95.1	60	TRANSUS
24189	2629	0	1216	532	1.11	185	368	17	788	10.4	96.2	94.2	44	CHURCHILL
36736	53374	0	0	1261	0.50	202	NA	81	NA	2.8	90.0	89.5	18	BURNHAM
0	0	0	0	NA	2.37	919	NA	NA	NA	NA	96.0	95.2	T 42	E & L
0	39418	0	0	852	1.69	926	NA	NA	NA	20.0	101.1	99.8	84	F F E
0	84141	0	0	1150	0.91	1463	0	73	0	20.0	95.8	93.5	40	CRETE
19643	5493	0	1786	542	1.17	319	329	24	732	13.1	105.3	100.1	94	MURPHY
11241	8943	12029	0	619	1.14	375	332	26	639	12.6	108.2	103.9	98	CAMPBELL
23932	2999	0	0	231	0.60	334	533	33	1185	7.4	89.6	85.6	16	SOUTHEASTERN
0	0	0	0	NA	NA	0	NA	NA	NA	NA	96.3	98.3	45	PENNSYLVANIA
0	0	42201	0	1028	1.32	701	NA	NA	NA	17.1	86.8	98.0	8	D P D
13715	0	0	0	224	1.42	211	387	20	847	9.7	82.9	83.7	2	NEW PENN
69902	0	0	0	NA	NA	0	NA	NA	NA	NA	83.0	84.9	3	WERNER
17889	584	0	1441	257	0.99	205	425	18	1020	8.0	89.2	88.9	15	AAA COOPER
0	26671	0	0	631	1.82	161	NA	42	NA	3.8	99.9	96.6	82	GLOBAL
34482	0	0	0	NA	NA	0	NA	NA	NA	NA	84.1	82.3	5	MATADOR
10726	7382	0	0	558	0.94	268	NA	NA	NA	8.2	104.4	99.0	93	MISTLETOE
14883	0	0	2206	394	1.24	108	392	11	1084	11.6	96.6	102.1	48	GRAVES
2578	234	11511	0	216	1.33	279	370	21	808	9.8	97.7	100.4	55	ADVANCE
0	0	67145	0	1615	0.90	735	NA	NA	NA	17.7	96.0	96.4	T 42	MIDWEST
19390	1863	1176	0	123	1.05	1089	335	87	423	7.8	97.3	92.3	52	JONES
2889	6	58811	0	654	0.86	1219	NA	NA	NA	12.9	94.4	91.2	34	CONTRACT
8933	0	22825	0	323	1.60	657	NA	NA	NA	6.7	99.6	99.4	77	CASSENS
16979	0	12727	0	304	1.82	1913	NA	NA	NA	19.6	101.2	99.4	86	PAULS
26666	0	5933	0	245	1.50	999	NA	NA	NA	7.5	99.8	95.9	80	AUTO CONVOY
16979	0	0	0	190	0.93	314	447	24	1119	8.5	87.7	87.1	11	ESTES
42268	12233	1104	0	NA	0.96	582	NA	NA	NA	NA	94.4	96.2	35	SOUTHWEST
24174	6146	0	0	458	1.51	1099	NA	NA	NA	16.6	91.3	90.7	21	JANESVILLE
0	50138	0	0	607	1.05	964	NA	NA	NA	11.7	94.3	94.6	33	DART TRANSIT
25266	159	22440	0	168	1.13	3617	NA	NA	NA	12.7	98.9	97.4	68	GROENDYKE
0	0	60737	0	845	0.86	863	NA	NA	NA	12.0	98.5	96.1	61	PRE FAB
7228	596	9722	1527	406	1.27	155	319	12	515	10.3	98.7	98.0	66	HYMAN
0	50608	0	0	910	0.96	1057	NA	NA	NA	19.0	96.8	95.2	50	MERCER
16843	89	0	0	147	0.78	157	324	13	909	4.2	98.7	102.3	65	HOLMES
22630	4810	10845	0	146	1.27	3750	NA	NA	NA	14.3	98.1	98.8	58	MILLER
30278	25464	0	0	1222	0.89	637	NA	NA	NA	14.0	94.0	90.7	31	STOOPS
2780	145	11141	0	238	1.13	348	274	23	661	10.5	87.2	83.7	10	SAIA
2308	0	16885	0	849	1.41	583	NA	NA	NA	15.0	101.1	97.9	85	KENOSHA
7115	5025	2857	0	167	1.36	567	319	40	628	9.8	105.7	103.4	96	DUFF
6338	37461	253	0	860	1.02	815	NA	NA	NA	15.9	99.1	95.3	70	ANDERSON
13919	0	0	0	306	1.19	111	276	11	570	8.5	99.3	98.9	76	LYONS
5357243	1716112	859152	124158	541	1.50	104207	53760	4185	103193	11.7	94.3	94.2		

For Top 100 listings under "Type": BM – building materials; CM – common; CT – contracts; GF – general freight; ED – explosives/dangerous articles; FP – forest products; HG – household goods; HM – heavy machinery; LP – liquid petroleum products (including, in most cases, other bulk commodities); MV – motor vehicles; RS – retail store delivery; SC – specific commodity not otherwise grouped tiated by the largest single Teamster bargaining unit in the country, plus an extensive piggyback operation that distorts UPS figures in the maintenance cost-per-mile category.

Rounding out the Top 5 for-hire carriers are Roadway Express, Yellow Freight and Consolidated Freightways. All reported increases in gross revenue, but, importantly, only one, Yellow Freight of Overland Park, Kan., reported an increase in profit after taxes. Yellow's profit margin jumped $14.7 million to $55.9 million, while Roadway and CF's combined profit margin decreased $8.6 million. Individually, Roadway's profit downturn was greater, $5.9 million; CF's margin was off $2.6 million. Both continue to be very profitable, however.

Raymond A. Stewart, Jr., president of Yellow Freight, attributed his company's increase in net profit to the impact of general rate increases, plus higher LTL tonnage. He said the LTL tonnage level increased 7% over 1984, but truckload tonnage was down 12%.

CF's CEO and board chairman Raymond F. O'Brien cited slower growth in the nation's general economy and the company's entry into the overnight freight market with Eastern Airlines of Miami as reasons for his company's 1985 decline in operating income. He noted, however, that by renegotiating its Eastern Airline contract, the company significantly lowered airhaul costs. In fact, the first quarter of 1986 has proved to be the best in the history of Consolidated Freightways.

IU still trucking

The spinoff by IU of P.I.E. Nationwide does not leave this Philadelphia-based conglomerate out of the trucking industry. IU also operates C&H Transportation, Dallas, Tex., which was granted an exception from reporting by the ICC in 1984. In 1983, C&H, a specialized heavy hauler, was listed as 51st in the Top 100. The company didn't file for 1985, either. IU also operates Inway, Helms/Byrns Express, Coast-To-Coast, Customized Transportation, Expressway Nationwide, Poole Truck Lines, Gemini Trucking, Ligon Nationwide, Ranger, Nationwide Intermodal, Transmark and Thurston Motor Freight. Of the 12, only Thurston appears in the Top 100, reporting losses for 1985 of $2.8 million.

During the past 12 months, another major player in the for-hire segment of the industry, Sun Carriers, moved to restructure its operations. Owned by Sun Company of Philadelphia, a national petroleum refiner, Sun Carriers terminated one truck operation but expanded services supplied by others. The flagship of Sun's truck operation is St. Johnsbury Trucking of Holliston, Me. St. Johnsbury, ranked 21st, had revenues of $227,810,000 and net profits of $8.1 million last year. St. Johnsbury's gross revenues were off in '85 by $4.4 million, but net profit was up. Other Sun Carriers include Jones Truck of Springdale, Ark., with profits of $2 million, down from 1984, and Milne Truck Line of Pleasanton, Calif. Milne reported a loss of $127,000. Sun Carriers also terminated operations last July of Carrier Systems Motor Freight which had served the Central States area. But both Jones and St. Johnsbury opened terminals in Ohio, Wisconsin and Indiana.

Much industry attention is focused on Leaseway Transportation Corp. of Cleveland due to the controversy over the company's ownership. As a result of a bitter fight for control, Leaseway's chief operating officer, Gerald McDonough, held preliminary meetings in May with prospective buyers of the corporation's transportation subsidiaries, most of which are part of the Top 100.

For example, Leaseway operates Anchor Motor Freight, a major car hauler for General Motors, ranked 11th in this year's Top 100, making it the biggest car carrier in the country. Leaseway also operates Signal Delivery Service of Downers Grove, Ill., and Dart Transit of St. Paul, Minn. Signal and Dart are basically captive carriers for Sears Roebuck & Co. Sears owns 20% of Signal Delivery and 29% of Dart. Signal Delivery ranked 22nd for 1985. Profits were in the black, but on the down side from the previous year, $8.2 million compared to $9.3 million. Still another Leaseway operation—one that is struggling—is Midwestern Distribution of Ft. Scott, Kan. Midwestern, an owner operator carrier of special commodities, lost $6.4 million in 1985.

Industry observers expect some of the Leaseway operation to be sold off individually because it appears to be too large, right now, for one buyer to swallow. Speculation is that Ryder Systems of Miami is one of the few companies equipped to meet the specific transportation demands being supplied by Anchor, Signal Delivery and Dart.

Interestingly, while Leaseway was beginning negotiations for the sale of some of its properties, the company announced the acquisition of the privately-held Transco Group of Somerset, N.J. Transco supplies contract carriage, warehousing and distribution services for the giant A&P store chain, PepsiCo and Safeway Grocery Stores. Leaseway said Transco owns and operates more than 2000 tractors and trailers and has annual revenues in excess of $120 million.

Because the Top 50 is a microcosm of the industry in general, reflecting as it does the performance of general commodity carriers, household goods carriers, bulk carriers, auto carriers and hazardous materials carriers, we can confidently draw an accurate picture of the industry's overall performance in a year's time.

Net profits down

An analysis of net profits in 1985 for the Top 50 shows this group did better in 1983 and 1984

Continued

RANK BY LINEHAUL CPM

LINEHAUL CPM RANK	GROSS REVENUE RANK	COMPANY NAME	LINEHAUL CPM ($)
1	6	Burnham Service Co Inc	0.50
2	68	Southeastern Frt Lns Inc	0.60
3	47	Builders Transport Inc	0.70
4	93	Holmes Transportation Inc	0.78
5	53	A-P-A Transport Corp	0.82
6	8	Overnite Trptn Co	0.83
7	42	Watkins Motor Lines Inc	0.83
8	81	Contract Freighters Inc	0.86
9	90	Pre-Fab Transit Co	0.86
10	56	Overland Express Inc	0.88
11	95	Stoops Express Inc	0.89
12	79	Midwest Coast Trpt Inc	0.90
13	65	Crete Carrier Corp	0.91
14	60	Transus Inc	0.92
15	39	Interstate Cont Carr Corp	0.93
16	85	Estes Express Lines	0.93
17	76	Mistletoe Express Service	0.94
18	27	Brown Transport Corp	0.95
19	36	Thurston Motor Lines Inc	0.95
20	86	Southwest Motor Freight	0.96
21	92	Mercer Transportation Co	0.96
22	31	Bowman Trptn Inc	0.97
23	73	AAA Cooper Trptn	0.99
24	9	A B F Freight Systems Inc	1.00
25	48	Holland Motor Exp Inc	1.01
26	14	Smith's Transfer Corp	1.02
27	44	Tri-State Mtr Transit Co	1.02
28	99	Anderson Trucking Svc Inc	1.02
29	80	Jones Transfer Company	1.05
30	88	Dart Transit Company	1.05
31	45	Old Dominion Frt Line Inc	1.07
32	21	St Johnsbury Trkg Co Inc	1.08
33	15	Transcon Lines	1.09
34	61	Churchill Truck Lines Inc	1.11
35	4	Yellow Freight System Inc	1.12
36	25	Central Freight Lns Inc	1.12
37	20	Central Transport Inc	1.13
38	59	Merchants Fast Mtr Lines	1.13
39	89	Groendyke Transport Inc	1.13
40	96	Saia Motor Frt Line Inc	1.13
41	38	Viking Freight System Inc	1.14
42	67	Campbell Sixty-Six Exp Inc	1.14
43	28	Pilot Freight Carriers Inc	1.15
44	10	Carolina Frt Crrs Corp	1.17
45	57	Northwest Trpt Svc Inc	1.17
46	66	Murphy Mtr Frt Lns Inc	1.17
47	55	Jones Motor Co Inc	1.19
48	100	Lyons Trptn Lines Inc	1.19
49	51	Midwestern Distb Inc	1.20
50	3	Roadway Express Inc	1.21
51	5	Consolidated Frtways of De	1.21
52	17	American Frt System Inc	1.21
53	7	P * I * E * Nationwide Inc	1.23
54	77	Graves Truck Line Inc	1.24
55	35	Hall's Motor Transit Co	1.25
56	91	Hyman Freightways Inc	1.27
57	94	Miller Transporters Inc	1.27
58	30	Jones Truck Lines Inc	1.30
59	70	D P D Inc	1.32
60	78	Advance Transportation Co	1.33
61	32	Garrett Freightlines Inc	1.34
62	50	National Freight Inc	1.35
63	46	Red Star Exp Lns-Auburn Inc	1.36
64	98	Duff Truck Line Inc	1.36
65	22	Signal Dlvy Service Inc	1.37
66	18	Preston Trucking Co Inc	1.38
67	52	Milne Truck Lines Inc	1.38
68	97	Kenosha Auto Trpt Corp	1.41
69	71	New Penn Mtr Express Inc	1.42
70	34	Chemical Leaman Tank Lns	1.43
71	40	Jack Cooper Trpt Co	1.43
72	26	Associated Truck Lns Inc	1.44
73	41	C W Transport Inc	1.49
74	11	Anchor Motor Freight Inc	1.50
75	84	Auto Convoy Co	1.50
76	87	Janesville Auto Trpt Co	1.51
77	19	Complete Auto Transit Inc	1.54
78	82	Cassens Transport Co	1.60
79	24	Matlack Inc	1.63
80	64	F F E Trptn Svcs Inc	1.69
81	16	Aero Mayflower Trst Co Inc	1.73
82	6	North American Van Lines	1.82
83	74	Global Van Lines Inc	1.82
84	83	Pauls Trucking Corp	1.82
85	49	The Motor Convoy Inc	1.88
86	29	Commercial Carriers Inc	1.92
87	33	Atlas Van Lines Inc	1.99
88	23	Bekins Van Lines Co	2.07
89	12	Allied Van Lines Inc	2.11
90	43	Nu-Car Carriers Inc	2.11
91	13	United Van Lines Inc	2.13
92	54	M & G Convoy Inc	2.24
93	58	Pacific Mtr Trkg Co	2.37
94	63	E & L Transport Co	2.37
95	1	United Parcel Svc Inc	2.71
[1]	2	United Parcel Svc Inc NY	
[2]	37	J B Hunt Transport Inc	
[3]	69	Pennsylvania Trk Lns Inc	
[4]	72	Werner Enterprises Inc	
[4]	75	Matador Service Inc	

[1] United Parcel Service reports linehaul cpm combined for New York and Illinois. [2] J.B. Hunt did not report total vehicle miles and therefore cannot be accurately ranked. Published reports attributed to the company, however, state an average 130,000 miles per tractor year. Based on that figure, and a total 1,290 owned tractors, the fleet would have operated 167,700,000 total miles in 1985. ATA reports total linehaul cost for J.B. hunt to be 96,980,000. That computes to $.58 linehaul cpm. [3] Pennsylvania Truck Lines does not operate a significant linehaul fleet. It operates primarily as a local P&D fleet for Conrail and files with the ICC as a local carrier. Any linehaul cost data, therefore, would be nominal and insignificant. [4] Werner and Matador did not report sufficient data to permit ranking by linehaul cpm.

than in 1985, despite the fact gross revenues continue increasing at a record-setting pace. (Note: In looking at the Top 50, it should be mentioned that while the figures in all categories for 1985 for Interstate Contract Carriers Corp. of Salt Lake City are reported, they have not been included in the analysis because Interstate figures reflect a consolidation of annual results with Western Express of Austell, Ga. Western Express was 68th in CCJ's 1985 Top 100 list, but the company does not appear this year. As a consequence, the figures used for discussion purposes here are for the Top 49 carriers).

Figures show net income after taxes, for 1985, of $663,844,000. This compares unfavorably with 1983 when net profits totaled $695,320,000, and 1984 when they reached $677,193,000. Simply, the story is that while major motor carriers of all commodities—the leaders in their particular categories—grossed more reve-

Continued

nue, they earned less. In fact, of the Top 49, 34 had increases in gross revenues but only 21 had increases in net profits.

Interestingly, many of the 15 companies in the Top 49 reporting declines in gross revenue are the same companies that have been victims in the past of poor performance. They include P.I.E. Nationwide; Associated Truck Lines of Denver, which has lost money for the last eight quarters; Pilot Freight, whose losses continue to escalate and ran to $13.8 million in 1985; Hall's Motor Freight of Mechanicsburg, Pa., which filed for bankruptcy earlier this year and is now reorganized as an intrastate carrier.

Smith's Transfer Corp. of Staunton, Va., is a good indicator of what can happen to a carrier in a changing world of deregulation and ownership. Once a successful family-owned carrier, Smith's is now a wholly-owned subsidiary of ARA Services of Philadelphia, Pa., one of the giants in the nation's food service industry. Today, Smith's is bleeding greenbacks. Last year, the loss rose to $7.9 million.

Taking into consideration losses in 1984, Smith's now has $11.2 million in red ink on its books.

Late last year, the company launched an employee stock ownership plan that was aimed at saving $25 million. Earlier, there were published reports ARA was trying to find a buyer for the carrier, but in documents filed with the Securities and Exchange Commission in Washington, ARA said it was extending the carrier a $10 million line of credit, but ARA also said poor financial performance makes it unlikely that ARA will invest further in Smith's. On the plus side, ARA also operates Cooper Motor Lines, a truckload carrier headquartered in Greenville, S.C., and run by former ATA chairman Dick Few.

Nearly the identical performance record can be found by examining the statistics of the second Top 100 (51 to 100) group. Here, 32 carriers reported declines in net profits while only 16 had a drop in gross revenues. By contrast, 18 reported increases in net profits, but 34 showed increases in gross revenue.

Clearly, an increase in gross revenue does not automatically translate into increased profitability as once was generally the situation under regulation.

Profits down at A-P-A

In a major surprise, A-P-A Transport of North Bergen, N.J., considered to be one of the better managed middle-level carriers in the nation, suffered a decline in net profit of $2.4 million, despite the fact gross revenues increased to $98,599,000 from $97,721,000. The company's standing in the operating ratio category also slipped to 4th with a very respectable 83.8. In the past, A-P-A has dominated first and second place. This year, J.B. Hunt Transport of Lowell, Ark., ranks first in operating ratio with 81.2. The company was also first in 1984 with a 75.4 OR. A.P.A. was second in 1984, but in 1985, New Penn Motor Express of Lebanon, Pa., jumped into second place with 82.9

Still another surprise in the same Top 100 category was Overland Express, headquartered in Indianapolis. In 1984, Overland reported net profits of $761,000, on revenues of $83.7 million. Last year, Overland lost $1,960,000 on revenues of $96.1 million. That's a swing of $2.7 million in one year.

William Hagerman, chairman and CEO of Overland, called 1985 a "transitional one for Overland." During the last 12 months, he said, the company relocated from Minneapolis, doubled headquarters' staff and added 25% to the fleet in new equipment.

Several other developments must also be included in this year's analysis of the Top 100. First, Schneider Transport of Green Bay, Wis., ranked 28th in 1984, does not appear this year because the company was granted an exception. Attempts to obtain information from the company directly proved unsuccessful. Also, McLean Trucking Co. of Winston-Salem, N.C., ranked 8th last year, is not listed because the company filed for bankruptcy and is no longer in business. The nation's largest intrastate carrier is Central Freight Lines of Waco, Tex., ranked 20th. Figures from J.B. Hunt Transport, Lowell, Ark., ranked 37th, and Werner Enterprises, Inc., Omaha, Neb., ranked 72, were obtained directly from company sources since both carriers were also granted exceptions.

Predictions of industry sources that motor carrier profits would rebound in 1985 failed to materialize as the Top 100 figures show. In fact, for the Top 100, total net profit was down $48,808,000 from 1984 levels and was even below the 1983 figure of $765,075,000. The industry's trend towards rate discounting and special pricing appears to be chiefly at fault. Huge increases in insurance costs, amounting to a 300% and higher jump in premiums, also cut deeply into profits. There is also speculation that increased use of bigger trailers and double bottoms nationwide has generated a surplus of trailer capacity that was not expected. Some carriers, especially smaller truckload operators who went to the more expensive 102-in. wide trailer to remain competitive, have discovered they can't fill them or at least fill them sufficiently to justify their added cost.

There has also been speculation that lower fuel costs would generate increased profits, especially in the fourth quarter of 1985. But the figures do not reflect that speculation. Lower fuel costs have been felt at almost every level of the industry, but the impact financially will probably be better measured in the first and second quarter figures for 1986.

Consolidation coming

Bernard G. Campbell, director of transportation services for Data

Text continues on page 82

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
101	RED ARROW FRT LNS INC, SAN ANTONIO, TX	CMGF	$54902	$56672	$1085-	103.2	97.7
102	NORTH PENN TRANSFER INC, LANSDALE, PA	CMGF	54683	54671	515-	100.0	103.4
103	WILLIG FREIGHT LINES, SAN FRANCISCO, CA	CMGF	54573	51847	1004	95.0	95.0
104	DAILY EXPRESS INC, CARLISLE, PA	CMSC	54046	51211	7309	94.8	92.3
105	CARRETTA TRUCKING INC, PARAMUS, NJ	CMGF	53963	49697	1764	92.1	91.0
106	SOUTHWESTERN MTR TRPT INC, SAN ANTONIO, TX	CMGF	53439	49329	2528	92.3	91.4
107	MELTON TRUCK LINES INC, SHREVEPORT, LA	CMBM	53273	53106	657	99.7	98.2
108	MORGAN DRIVE AWAY INC, ELKHART, IN	CMSC	53005	52901	354	99.8	96.4
109	NATIONAL CARRIERS INC, LIBERAL, KS	CMRC	52714	49875	2144	94.6	93.0
110	DALLAS & MAVIS FWDG CO, KENOSHA, WI	CMMV	52068	50070	995	96.2	93.9
111	DEATON INC, BIRMINGHAM, AL	CMSC	51914	47388	1903	91.3	88.6
112	FLEET TRANSPORT CO INC, CLEVELAND, OH	CMLP	51718	52625	1616-	101.8	102.7
113	ALTERMAN TRPT LNS INC, OPA LOCKA, FL	CMRC	51230	50102	216	97.8	96.6
114	COASTAL TANK LINES INC, AKRON, OH	CMLP	51046	49785	92-	97.5	108.0
115	CONVOY COMPANY, PORTLAND, OR	CMMV	50428	47946	2686	95.1	97.0
116	G I TRUCKING CO, LA MIRADA, CA	CMGF	49602	48889	142	98.6	103.1
117	SCHWERMAN TRUCKING CO, MILWAUKEE, WI	CMSC	49574	48161	202	97.1	95.3
118	WILLIS SHAW FROZEN EXP, ELM SPRINGS, AR	CMRC	49062	44619	2470	90.9	88.7
119	NATIONWIDE CARRIERS INC, MAPLE PLAIN, MN	CMRC	48732	51128	2341-	104.9	100.5
120	WILSON TRUCKING CORP, FISHERSVILLE, VA	CMGF	48651	43214	3018	88.8	87.7
121	WHITEFORD TRUCK LINES INC, SOUTH BEND, IN	CMGF	48441	49604	1034-	102.4	99.9
122	DSI TRANSPORTS INC, DEER PARK, TX	CMSC	48258	43273	1373	89.7	91.0
123	REFINERS TRPT & TERM CORP, CLEVELAND, OH	CMLP	46754	44948	412	96.1	98.8
124	MERCHANTS HOME DLVY SVC, OXNARD, CA	CMGF	44905	41143	1110	91.6	91.9
125	SANBORN'S MOTOR EXP INC, PORTLAND, ME	CMGF	44735	44781	204	100.1	99.5
126	MAY TRUCKING CO, PAYETTE, ID	CMGF	43999	43547	185	99.0	97.7
127	COLONIAL FREIGHT SYS INC, KNOXVILLE, TN	CMGF	43704	42197	480	96.6	96.9
128	LYNDEN TRANSPORT INC, SEATTLE, WA	CMGF	43179	40981	1726	94.9	97.5
129	JACK GRAY TRANSPORT INC, GARY, IN	CMSC	42964	42665	151	99.3	98.6
130	ECK MILLER TRPTN CORP, ROCKPORT, IN	CMGF	42356	41301	1466	97.5	97.7
131	A A A TRUCKING CORP, TRENTON, NJ	CMGF	42193	42807	389-	101.5	97.1
132	MC KENZIE TANK LINES INC, TALLAHASSEE, FL	CMLP	41804	39023	1726	93.3	89.9
133	MISSOURI NEBRASKA EXP INC, ST JOSEPH, MO	CMGF	41802	40291	381	96.4	95.4
134	MONKEM COMPANY INC, JOPLIN, MO	CMSC	41786	41857	363-	100.2	98.1
135	CROUSE CARTAGE CO, CARROLL, IA	CMGF	41590	42076	30-	101.2	98.0
136	MUNSON TRANSPORTATION INC, MONMOUTH, IL	CMGF	40911	37248	964	91.0	89.3
137	MARTEN TRANSPORT LTD, MONDOVI, WI	CMRC	39690	34846	960	87.8	88.2
138	HADLEY AUTO TRANSPORT, SANTA ANA, CA	CTMV	39657	37264	838	94.0	94.0
139	WHEATON VAN LINES INC, INDIANAPOLIS, IN	CMHG	39613	37854	1425	95.6	93.1
140	SAUNDERS CARRIERS INC, BIRMINGHAM, AL	CMLP	39504	39248	43-	99.4	100.1
141	CENTRAL TRANSPORT INC, HIGH POINT, NC	CMSC	38786	35088	2524	90.5	92.0
142	WILEY SANDERS TRUCK LNS INC, TROY, AL	CMSC	38642	35769	1349	92.6	101.6
143	STEVE D THOMPSON TRKG, WINNSBORO, LA	CMGF	38209	34312	1661	89.8	91.9
144	GROSS & HECHT TRKG INC, EDISON, NJ	CTRS	38180	36257	957	95.0	94.9
145	WARREN TRANSPORT INC, WATERLOO, IA	CMHM	38028	35198	1850	92.6	92.5
146	FLEET CARRIER CORP, PONTIAC, MI	CMMV	37758	32375	4096	85.7	95.1
147	FOUR WINDS VAN LINES INC, SAN DIEGO, CA	CMHG	37629	38070	434-	101.2	99.5
148	JAY LINES INC, D F W STATION, TX	CMGF	37538	35759	414	95.3	93.4
149	SPARTAN EXPRESS INC, GREER, SC	CMGF	37493	35712	626	95.3	86.9
150	INTERSTATE DISTRIBUTOR CO, TACOMA, WA	CTFP	37320	36438	257	97.6	98.5

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
151	**SAM TANKSLEY TRKG INC, CAPE GIRARDEAU, MO**	CMGF	$36749	$36818	$161-	100.2	98.5
152	**PIRKLE REFRIG FRT LNS INC, MADISON, WI**	CMRC	36679	36086	102	98.4	96.0
153	**THE WAGGONERS TRUCKING, BILLINGS, MT**	CMGF	36261	35401	724	97.6	94.6
154	**PLOOF TRUCK LINES INC, JACKSONVILLE, FL**	CMBM	35852	30857	4721	86.1	85.0
155	**DI SALVO TRUCKING CO, SAN FRANCISCO, CA**	CMGF	35804	35981	324-	100.5	101.4
156	ROBERTS EXPRESS INC, AKRON, OH	CMGF	35798	31908	2358	89.1	95.1
157	KENAN TRANSPORT CO, CHAPEL HILL, NC	CMLP	35737	31461	2385	88.0	87.7
158	FREDRICKSON MTR EXP CORP, CHARLOTTE, NC	CMGF	35577	35172	212-	98.9	96.0
159	MITCHELL TRANSPORT INC, CLEVELAND, OH	CMSC	35299	36181	2894-	102.5	94.2
160	SCHANNO TRPTN INC, W ST PAUL, MN	CMGF	35244	33974	355	96.4	92.8
161	**CON-WAY EASTERN EXPRESS INC, PORTLAND, OR**	CMGF	34905	35716	1413	102.3	104.4
162	**BLUE RIDGE TRF CO INC, ROANOKE, VA**	CMSC	34881	34634	129	99.3	95.4
163	**ROBCO TRANSPORTATION INC, DES MOINES, IA**	CMGF	34860	36362	942-	104.3	98.6
164	**FORE WAY EXPRESS INC, WAUSAU, WI**	CMGF	34806	34505	192	99.1	103.3
165	**GEORGE TRANSFER INC, PARKTON, MD**	CMSC	34776	34015	230	97.8	98.0
166	WARD TRUCKING CORP, ALTOONA, PA	CMGF	34286	34090	412	99.4	99.1
167	SHAFFER TRUCKING INC, NEW KINGSTOWN, PA	CMSC	34140	30884	1984	90.5	90.3
168	MIDWEST EMERY FRT SYS INC, MC COOK, IL	CMRC	34038	35532	2022-	104.4	99.3
169	SAMMONS TRUCKING, MISSOULA, MT	CMBM	33799	32668	844	96.7	94.1
170	ALTRUK FREIGHT SYS INC, TAMPA, FL	CMGF	33245	33326	486-	100.2	98.1
171	**R W SERVICE SYSTEM INC, TAYLOR, MI**	CMGF	32848	32550	202	99.1	97.1
172	**MANFREDI MOTOR TRANSIT CO, NEWBURY, OH**	CTSC	32695	30561	563	93.5	94.0
173	**AVERITT EXPRESS INC, COOKEVILLE, TN**	CMGF	32679	30181	445	92.4	91.1
174	**MONTGOMERY TANK LNS INC, SUMMIT, IL**	CMSC	32519	31361	49-	96.4	97.2
175	**GLENN MC CLENDON TRKG CO, LAFAYETTE, AL**	CMGF	32363	30148	681	93.2	92.5
176	MIDDLEWEST FRTWAYS INC, ST LOUIS, MO	CMGF	32063	31203	236	97.3	95.2
177	ASSOCIATED PETRO CRRS INC, SPARTANBURG, SC	CMLP	31869	31501	493	98.8	98.3
178	A J METLER HLG & RIG INC, KNOXVILLE, TN	CMSC	31836	30534	556	95.9	95.2
179	ACME TRUCK LINE INC, HARVEY, LA	CMSC	31674	32075	294-	101.3	99.3
180	ENTERPRISE TRPTN CO, HOUSTON, TX	CMLP	31085	31744	381-	102.1	90.7
181	**LENERTZ INC, SOUTH ST PAUL, MN**	CMGF	30904	30493	58	98.7	99.4
182	**MC GIL SPECIALIZED CARRIERS, MARIETTA, GA**	CMSC	30845	31021	226-	100.6	99.0
183	**ARMELLINI EXPRESS LNS INC, PALM CITY, FL**	CMSC	30682	31831	472-	103.7	98.1
184	**E L FARMER & CO, ODESSA, TX**	CMSC	30617	29239	796	95.5	92.8
185	**THE O K TRUCKING CO, CINCINNATI, OH**	CMGF	30463	30270	254-	99.4	99.1
186	C R ENGLAND & SONS INC, SALT LAKE CITY, UT	CMRC	30450	32064	1125-	105.3	103.3
187	THREE WAY CORPORATION, SUNNYVALE, CA	CMHG	30387	28041	305	92.3	0.0
188	LIQUID TRANSPORT CORP, GREENFIELD, IN	CMLP	30276	30775	1208-	101.7	95.8
189	RUAN TRANSPORT CORP, DES MOINES, IA	CMLP	30194	30355	989-	100.5	98.7
190	UMTHUN TRUCKING CO, EAGLE GROVE, IA	CMBM	29791	29192	142	98.0	97.7
191	**BESTWAY TRANSPORTATION, PHOENIX, AZ**	CMGF	29629	28751	301-	97.0	99.7
192	**MALONE FREIGHT LINES INC, BIRMINGHAM, AL**	CMGF	29617	29961	574-	101.2	99.5
193	**GREAT COASTAL EXPRESS INC, RICHMOND, VA**	CMGF	29290	27713	743	94.6	83.8
194	**COORS TRANSPORTATION CO, WHEATRIDGE, CO**	CMRC	29181	28305	407	97.0	96.4
195	**MERCHANTS TRUCK LINE INC, NEW ALBANY, MS**	CMGF	29031	27703	197	95.4	97.9
196	H & W MOTOR EXPRESS CO, DUBUQUE, IA	CMGF	28966	28223	1322	97.4	95.6
197	SMITHWAY MTR XPRESS INC, FORT DODGE, IA	CMBM	28884	27484	545	95.2	94.5
198	L C L TRANSIT CO, GREEN BAY, WI	CMSC	28757	28959	122	100.7	99.6
199	IVORY INC, WEST PALM BEACH, FL	CMGF	28650	28175	451	98.3	96.8
200	R P D INC, MIAMI, FL	CTSC	28596	26624	16	93.1	95.7
	TOTAL – 1985		**$3,895,628**	**$3,739,735**	**$59,970**		
	TOTAL – 1984		**4,016,147**	**3,874,112**	**66,697**		
	TOTAL – 1983		**3,748,624**	**3,594,813**	**86,871**		

Resources, Inc., Lexington, Mass., predicts the number of trucking companies will shrink dramatically before 1990. Similar predictions have been made by many influential motor carrier presidents who are forecasting a consolidation of the major coast-to-coast truck lines, while the number of regional carriers, they say, will remain about the same. What will happen to truckload carriers using independent contractors depends on who you talk with. The future of this segment of the industry is clouded, at best.

Campbell said carriers most likely to fail "...have annual revenues under $1 million and are most vulnerable to temporary economic downturns." Campbell also sees tomorrow's industry with significant over-capacity.

"Deregulation has drastically reduced the ratio of empty to loaded miles because trucks can now go anywhere and transport practically anything they want," he said. "At the same time, truck trailer size has been increasing without a corresponding increase in operating costs. The result has been a drop in the cost to move goods, which means downward pressure on motor carrier rates."

Officials of American Trucking Associations seem to share the same viewpoint. Speaking at the National Press Club in Washington, D.C., earlier this year, ATA president Thomas Donohue said: "...financial failures are not peculiar to the trucking industry. This is not the end of it."

There can be no doubt that conditions in the trucking industry have changed. Evidence of that is clearly seen in the number of smaller carriers formerly ranked in the 101 to 200 category that have slipped into the Top 100 in the last year and the number of new carriers now in the second 100 list. Five years ago, under regulation, that kind of growth would never have happened. This year, there are 26 carriers among the 200 largest for-hire fleets that were not there last year. Typical of those that have slipped into the Top 100 are specialized commodity carriers like Stoops Express, of Anderson, Ind., ranked 95th; Mercer Transportation of Louisville, Ky., a building materials hauler, ranked 92nd; Hyman Freightways of St. Paul. Last year Hyman, a general commodities carrier, ranked 121st. This year the company is 91st.

One of the best examples of growth among smaller carriers is FFE Transportation, now ranked 64th. FFE, operated by Frozen Food Express of Dallas, reported a 36% increase in revenues. This gain was achieved through the acquisition of three related carriers: Curtis Inc., RTC Transportation and specific assets of Transpo International and Transpo Express. While the company's profit picture was distorted last year because of the termination of pension plans from two subsidiaries and the reversion of surplus funds to the parent, FFE's willingness to expand and take risks through acquisitions is, so far, paying off. The company is privately held and owned by Stony Stubbs, also a former ATA chairman.

Under regulation, small carriers were reluctant to risk big bucks to grow, even if they had access to venture capital and even if the Interstate Commerce Commission would allow it. As a result, small carriers stayed small, while big carriers with the necessary cash and clout to finance expansion, got bigger. Roadway, Yellow and CF are typical.

Bigger isn't better

That's changing now, however, as we can see by looking at the Top 100. For example, in the second 100, 29 carriers lost money in 1985. That's only five more than in the first Top 100, where you would expect better performance because of better management in relation to carrier size and ability to hire based on higher salaries and other financial incentives. But it is not necessarily true. In addition, the addition of 26 new carriers reflects a great deal of activity or movement in this classification. Another typical example of developing companies is Circle Express, actually a holding company with increasing influence. The parent owns four irregular route truckload carriers and was the first trucking company to go public since 1983.

While Circle Express was established in 1983, the carriers it operates have been around for 20 or more years. They include Eck Miller Transportation, ranked 130th; R.W. Service, ranked 171st; plus Rainbow Express and March Express which are not among the 200 largest for-hires.

Others in the largest 200 common carriers group are also part of larger organizations. Con-Way Eastern Express, ranked 161st, which is the old Penn Yan Co., was acquired by Consolidated Freightways; G.I. Trucking of LaMirada, Calif., ranked 116th, is part of Carolina Freight, Cherryville, N.C., along with Red Arrow Freight Lines, San Antonio, Tex. Red Arrow earned $515,000 in 1984, but suffered a downturn in 1985, losing $1.08 million in net.

G.I. Trucking and Red Arrow are important partners in Carolina Freight's intermodal operations. In a strange switch of circumstances, G.I. Trucking, which lost money in 1984, was profitable in 1985 to the tune of $142,000, reversing roles with Red Arrow. Earlier, G.I. losses were attributed to a breakdown in G.I.'s computer system, Carolina Freight president Ken Younger said last year that problem had been corrected and G.I.'s return to profitability appears to substantiate Younger's prediction.

It should also be noted that Coastal Tank Lines of Akron, Oh., ranked 114th, is being operated on a lease basis by Chemical Leaman, located in suburban Philadelphia. Chemical Leaman says it is trying to acquire the major assets of Coastal Tank which filed for bankruptcy under Chapter 11 in June. If the acquisition is up-proved, Chemical Leaman would pass Matlack, also of suburban Philadelphia, as the nation's largest bulk carrier.

"Our intention is to keep things running under a temporary agreement and to continue serving Coastal's customers under our authority and insurance," said Alan Montgomery, Chemical Leaman vp.

Other carriers with bigger affiliations include Best-Way Transportation of Phoenix, ranked 191 and owned by TNT Transport of Sydney, Australia, a subsidiary of Thomas Nationwide Transport, reportedly the world's largest commercial freight system. Best-Way was founded by John Pifer who was associated with the origin of Viking Freight. Pilot Freight is a subsidiary of TNT.

Hard runners

The hard runners in the industry continue to be:

- Overnite Transportation, Richmond, Va., one of the country's largest for-hire carriers operating without a Teamster contract. Overnite earned $39 million on revenues of $469.6 million and is now ranked 8th. While low-key, the company is well respected within industry circles.
- Carolina Freight continues to push the Top five with revenues of $411 million and profits after taxes of $14.9 million. CEO Ken Younger has taken the company into Europe with intermodalism and more recently opened terminals in Mexico.
- J.B. Hunt has become a major player in the for-hire transportation game since deregulation.
- Builders Transport of Camden, S.C., also continues to prosper. B.M. Shirley, president of Builders Transport, said the company achieved new highs in revenue and profit for 1985. Coupled with the acquisition of Dedicated Fleet, Inc., formerly Sonoco Transportation, Inc., Shirley said Builders Transport in 1986 will "...intensify marketing efforts in order to capture a larger share of the higher service truckload market. High on our list of priorities will be to improve operating efficiency, enhance the company's loaded mile ratio and control costs."

In reality, that is the goal for the nation's largest 200 fleets. How successful truck operators will be in 1986 in achieving this goal remains to be seen. In the final analysis, controlling costs is the number one priority for any motor carrier wishing to retain liquidity and profitability. Unfortunately, uncontrollable costs like insurance and discounting put a severe strain on the best management skills. As the figures vividly demonstrate, achieving record revenues is not necessarily the key to financial happiness, but it is a requirement for survival.

As deregulation puts greater pressures on competitive situations, motor carriers must become more innovative in their marketing and operating strategies if they are to survive.

Index To TOP 100 As Ranked By Revenue

	1985	1984
AAA Cooper Trptn	73	83
A B F Freight Systems Inc	9	10
A-P-A Transport Corp	53	50
Advance Transportation Co	78	81
Aero Mayflower Trst Co Inc	16	19
Allied Van Lines Inc	12	12
American Frt System Inc	17	17
Anchor Motor Freight Inc	11	16
Anderson Trucking Svc Inc	99	108
Associated Truck Lns Inc	26	27
Atlas Van Lines Inc	33	34
Auto Convoy Co	84	67
Bekins Van Lines Co	23	26
Bowman Trptn Inc	31	35
Brown Transport Corp	27	32
Builders Transport Inc	47	66
Burnham Service Co Inc	6	71
C W Transport Inc	41	40
Campbell Sixty-Six Exp Inc	67	59
Carolina Frt Crrs Corp	10	11
Cassens Transport Co	82	77
Central Freight Lns Inc	25	29
Central Transport Inc	20	20
Chemical Leaman Tank Lns	34	36
Churchill Truck Lines Inc	61	61
Commercial Carriers Inc	29	33
Complete Auto Transit Inc	19	21
Consolidated Frtways of De	5	5
Contract Freighters Inc	81	112
Crete Carrier Corp	65	73
D P D Inc	70	114
Dart Transit Co	88	104
Duff Truck Line Inc	98	98
E & L Transport Co	63	70
Estes Express Lines	85	95
F F E Trptn Svcs Inc	64	87
Garrett Freightlines Inc	32	31
Global Van Lines Inc	74	65
Graves Truck Line Inc	77	76
Groendyke Transport Inc	89	86
Hall's Motor Transit Co	35	30
Holland Motor Exp Inc	48	56
Holmes Transportation Inc	93	105
Hunt J B Transport Inc	37	49
Hyman Freightways Inc	91	121
Interstate Cont Carr Corp	39	75
Jack Cooper Trpt Co	40	38
Janesville Auto Trpt Co	87	93
Jones Motor Co Inc	55	69
Jones Transfer Co	80	83
Jones Truck Lines Inc	30	37
Kenosha Auto Trpt Corp	97	89
Lyons Trptn Lines Inc	100	107
M & G Convoy	54	57
Matador Service Inc	75	85
Matlack Inc	24	24
Mercer Transportation Co	92	115
Merchants Fast Mtr Lines	59	54
Midwest Coast Trpt Inc	79	90
Midwestern Distb Inc	51	39
Miller Transporters Inc	94	99
Milne Truck Lines Inc	52	48
Mistletoe Express Service	76	72
The Motor Convoy Inc	49	55
Murphy Mtr Frt Lns Inc	66	52
National Freight Inc	50	58
New Penn Mtr Express Inc	71	87
North American Van Lines	6	7
Northwest Trpt Svc Inc	57	64
Nu-Car Carriers Inc	43	43
Old Dominion Frt Line Inc	45	41
Overland Express Inc	56	62
Overnite Trptn Co	8	9
Pacific Mtr Trkg Co	58	46
Pauls Trucking Corp	83	96
Pennsylvania Trk Lns Inc	69	80
P-I-E Nationwide Inc	7	6
Pilot Freight Carriers Inc	28	25
Pre-Fab Transit Co	90	97
Preston Trucking Co Inc	18	18
Red Star Exp Lns-Auburn Inc	46	51
Roadway Express Inc	2	3
Saia Motor Frt Line Inc	96	101
St Johnsbury Trkg Co Inc	21	22
Signal Dlvy Service Inc	22	23
Smith's Transfer Corp	14	14
Southeastern Frt Lns Inc	68	79
Southwest Motor Freight	86	91
Stoops Express Inc	95	128
Thurston Motor Lines Inc	36	44
Transcon Lines	15	15
Transus Inc	60	53
Tri-State Mtr Transit Co	44	45
United Parcel Svc Inc	1	1
United Parcel Svc Inc NY	2	2
United Van Lines Inc	13	13
Viking Freight System Inc	38	47
Watkins Motor Lines Inc	42	42
Werner Enterprises Inc	72	106
Yellow Freight System Inc	4	4

INDUSTRY TRENDS AND STATISTICS

By **JERRY STANDLEY**, *Editor-In-Chief*, and **MARGARET ROMAN-SLAVIN**, *Market Research Editor*

Despite manufacturers' current declarations of sales activity slowdowns, economic forecasters continue to preach optimism for truck and trailer sales. Few, however, will dare to project beyond 1987.

Peter M. Toja, vice president of Merrill Lynch Economics, for one, says stepped up economic expansion and still lower interest rates in 1986 and all of 1987 are "bullish in terms of business investment in equipment."

Martin Labbe Associates projects a similar picture based on data from Chase Econometrics and Data Resources, Inc., that is, no recession in sight for the remainder of '86 and '87.

The Automotive Market Research Council offers a forecast that 1986 medium duty factory sales (Classes 4 - 7) will decline to 146,500 units, then stabilize between 147,000 and 152,000 units through 1990. Imports, AMRC indicates, will account for 19% of volume by that time. AMRC projects a rosy Class 8 picture ("excluding coaches") of 143,000 to 149,000 units, with imports pegged at 4%.

A widespread consensus is that demand for truck equipment will be moderate to strong through the remainder of the decade, and that tonnage and productivity incentives will be sufficient to support the investment.

STATISTICAL ANALYSIS OF THE TRUCK INDUSTRY—PRIVATE AND FOR-HIRE CARRIAGE*

FLEET SIZE	TOTAL FLEETS	TOTAL VEHICLES	# OF STRAIGHT TRUCKS OPERATED	# OF TRACTORS OPERATED	# OF TRAILERS OPERATED	# OF BUSES OPERATED	# OFF-HIGHWAY VEHICLES OPERATED
500 & over	4,409	5,265,228	1,946,391	757,257	1,971,643	235,982	353,955
100—499	14,859	2,202,271	740,144	384,920	748,523	133,088	195,596
50—99	14,864	783,086	265,464	137,838	241,329	55,318	83,137
25—49	21,302	569,656	222,850	90,512	150,558	42,961	62,775
10—24	22,043	283,206	130,327	43,593	64,760	18,878	25,648
TOTAL	**77,477**	**9,103,447**	**3,305,176**	**1,414,120**	**3,176,813**	**486,227**	**721,111**
VOCATION OR BUSINESS							
Common/ Contract	16,119	2,514,685	286,041	587,946	1,589,087	16,915	34,696
Lease/Rental	3,810	1,238,681	492,310	244,214	468,332	8,706	25,119
Food Industry	9,595	695,460	263,852	132,260	255,262	3,508	40,578
Local, State & Federal Government	7,149	1,259,176	757,813	86,475	92,955	37,054	284,879
Construction/ Mining	11,808	613,778	284,948	55,626	111,718	3,622	157,864
Manufacturing/ Processing	6,479	411,156	116,899	84,260	153,319	3,344	53,334
Petroleum	3,272	188,027	76,383	36,819	65,539	1,206	8,080
Public Utility	3,393	700,753	554,628	10,972	79,175	4,457	51,521
Retail/ Whole-sale Delivery	7,254	372,339	159,857	53,449	126,868	3,563	20,602
Sanitation & Refuse	814	57,365	44,021	3,507	5,552	174	4,111
Schools	3,582	227,514	45,961	2,445	4,460	163,540	11,108
Buses	1,768	215,705	10,749	1,197	4,253	196,747	2,759
Other	2,434	608,808	211,714	114,950	220,293	43,391	18,460
TOTAL	**77,477**	**9,103,447**	**3,305,176**	**1,414,120**	**3,176,813**	**486,227**	**721,111**

* Does not include passenger cars. *Source: CCJ Census of the Professional Truck Fleet Market, September 1985*

TRENDS & STATISTICS

NUMBER OF FOR-HIRE CARRIERS

Year	Class I[1] (Over $5 Million)	Class II ($1-$5 Million)	Class III (Under $1 Million)	TOTAL
1985	1,013	1,489	30,337	33,283[2]
1984	1,088	1,554	27,370	30,481
1983	1,139	1,631	24,411	27,517
1982	1,144	2,139	22,059	25,722
1981	1,031	2,293	18,563	22,270
1980	947	2,164	14,610	18,045
1979	992	2,754	13,337	17,083

This chart indicates changes in the number of for-hire carriers, by Class, for the past seven years. In 1985 there were 2,967 operating authorities granted to Class III carriers increasing their ranks by 10.8% over 1984. Overall the number of Class III carriers has more than doubled since 1979. Meanwhile, Class II carriers continue to diminish, with 65 fewer in 1985 than in 1984, and a 46% overall reduction to 1,489 in 1985 compared to 2,754 in 1979. The number of Class I carriers decreased by 75 companies last year. While volatile on a year-to-year basis, the number of Class 1 carriers remains relatively stable.

Source: American Trucking Associations, Inc.

[1] Approximately 50 of the largest Class I carriers earn more than $50 million gross annual revenues; four of those earn more than $1 billion annually. [2] 1985 total reflects 444 Class I and II carriers that were operating in 1985, but which have received ICC exemptions from filing annual financial reports.

SELECTED FINANCIAL DATA FROM CLASS 1 AND CLASS 2 COMMON CARRIERS

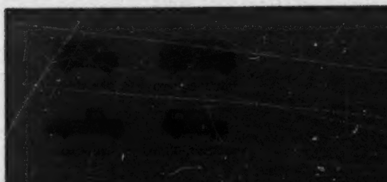
	All General Freight & Specialized Carriers		Percent of Change (85-84)	Percent of Revenue (1985)
	1985 ($000)	1984 ($000)		
Number of Carriers	549	549		
GROSS OPERATING REVENUES	$20,742,077	$20,419,414	1.58%	100.00%
Salaries-Officers and Supervisors	$1,582,036	$1,500,811	5.41%	7.63%
Salaries & Wages	$5,814,598	$5,819,302	(0.08)%	28.03%
Miscellaneous Paid Time Off	$580,356	$564,543	2.80%	2.80%
Other Fringes	$2,199,222	$2,133,576	3.08%	10.60%
Salaries, Wages & Fringe Benefits	$10,176,212	$10,018,232	1.58%	49.06%
Operating Supplies & Expenses	$2,436,406	$2,533,617	(3.84%)	11.75%
General Supplies & Expenses	$897,813	$844,388	6.33%	4.33%
Operating Taxes & Licenses	$715,422	$641,085	11.60%	3.45%
Insurance	$550,634	$458,437	20.11%	2.65%
Communication & Utilities	$353,652	$344,468	2.67%	1.70%
Depreciation & Amortization	$860,806	$784,654	9.71%	4.15%
Equipment Rental & Purch. Trptn.	$3,666,122	$3,631,005	0.97%	17.67%
Building & Office Equipment Rental	$207,691	$190,862	8.82%	1.00%
Other & Miscellaneous Expenses	$158,458	$125,065	26.70%	0.76%
TOTAL OPERATING EXPENSES	$20,023,216	$19,571,813	2.31%	96.53%
NET CARRIER OPERATING INCOME	$718,861	$847,601	(15.19)%	3.47%
NET INCOME BEFORE TAXES	$608,010	$750,521	(18.99%)	2.93%
NET INCOME AFTER TAXES	$342,583	$482,401	(28.98)%	1.65%
OPERATING RATIO	96.53	95.85		
NET PROFIT MARGIN	1.65%	2.36%		
Vehicle Miles Traveled	9,305,708	9,375,312	0.75%	
Tons Handled	336,180	343,959	(2.27)%	

This chart compares totals and percentage changes in certain 1985 and 1984 financial items for 549 Class 1 and 2 common carriers. Overall, the carriers' 1985 financial performance fell off slightly in virtually all categories. Average Operating Ratio worsened to 96.53 from 95.85 a year earlier. While Gross Operating Revenues improved slightly by 1.58%, expenses increased 2.31% for an average reduction in profit margins to 1.65%, vs. 2.36% in 1984. Other than the Miscellaneous Expenses category, predictably, the greatest increase in 1985 expenses was for Insurance which jumped 20.11% following a similar increase the previous year. Operating Taxes and Licenses had the second largest increase at 11.60%, this, in addition to a 26.21% increase in 1984 over 1983. Tonnage handled by the group dropped 2.27% while miles traveled dipped .75%. Items listed here were compiled by American Trucking Associations, Inc., based on carrier financial reports (Form QFR) to the ICC by Class 1 and 2 "Instruction 27" carriers (75% or greater revenues derived from general commodity freight). Statistics from United Parcel Service (approximately $6 billion in revenues), contract carriers and household goods movers are excluded from this chart. To provide accurate comparisons, figures for 1984 are restated on the basis of those same carriers filing 1985 returns with the ICC.

TRENDS & STATISTICS

FACTORY SALES OF TRUCKS BY GVW (1971 through 1985)

(Includes U.S. total domestic and export sales. Excludes tactical military vehicles and buses.)

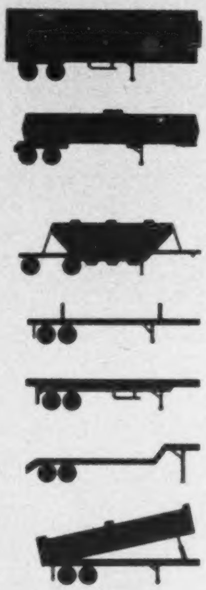
		No. of Units	% of Total
	CLASS 1 6,000 lb & Less	17,846,394	48.6
	CLASS 2 6,001-10,000 lb	14,313,130	39.0
	CLASS 3 10,001-14,000 lb	285,539	.8
	CLASS 4 14,001-16,000 lb	39,560	.1
	CLASS 5 16,001-19,500 lb	147,219	.4
	CLASS 6 19,501-26,000 lb	1,648,468	4.5
	CLASS 7 26,001-33,000 lb	662,662	1.8
	CLASS 8 33,001 lb & Over	1,775,417	4.8
	TOTAL	36,718,389*	100.0

* R.L. Polk estimates the total number of Class 1-8 trucks in use is 42,387,000. The R.L. Polk total includes imported vehicles, school buses and private fleet buses, but does not include municipal buses. The CCJ total listed above does not include buses or imports.

Source: Motor Vehicle Manufacturers Association, CCJ Marketing Dept.

TRENDS & STATISTICS

BREAKDOWN OF NEW TRAILER SHIPMENTS (1971 through 1985)



	Number	% of Total
VANS		
Dry Freight/Closed Top	1,051,752	47.0
Dry Freight/Open Top	66,650	3.0
Insulated/Semi-Insulated	260,402	11.6
Drop Frame	70,041	3.1
Livestock	22,714	1.0
Total Vans	1,471,559	65.7
SPECIAL TYPES		
Tanks/Liquid	97,170	4.3
Dry Bulk	26,689	1.2
Pole and Logging	25,243	1.1
Platform	344,079	15.4
Low-Bed	86,483	3.9
Dump	102,423	4.6
All Others	85,838	3.8
Total Special Types	767,925	34.3
TOTAL COMPLETE TRAILERS	2,239,484	100.0
Detachable Trailers[1]	132,021	
Detachable Chassis[2]	226,905	
Dollies and Converter Gear[3]	50,548	

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly used to convert semi-trailer into full trailer for twin trailer operations.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

NEW TRAILER SHIPMENTS BY TYPE

Type of Trailer	1985	1984	1983	1982	1981
VANS					
Dry Freight/Closed Top	84,950	115,399	58.954	41,461	49,153
Dry Freight/Open Top	3,685	4,087	3,215	2,757	3,444
Insulated/Semi Insulated	21,934	27,768	19,961	17,066	15,828
Drop Frame	8,229	7,112	3,193	2,837	2,806
Livestock	1,421	2,234	1,121	771	690
Total Vans	120,219	156,600	86,444	64,892	71,921
SPECIAL TYPES					
Tanks/Liquid	5,670	4,818	3,859	5,292	7,281
Dry Bulk	1,477	1,556	1,002	1,297	1,962
Pole and Logging	1,977	3,371	3,433	1,025	1,134
Platform	18,839	25,685	15,476	13,202	22,054
Low-Bed	11,414	8,281	3,967	3,379	9,137
Dump	8,903	8,895	4,466	4,707	6,548
All Others	7,807	4,550*	3,064	2,396	2,418
Total Special Types	56,087	57,156*	35,267	31,298	50,534
TOTAL COMPLETE TRAILERS	**176,306**	**213,756***	**121,711**	**96,190**	**122,455**
Detachable Trailers[1]	286	983	2,215	3,988	7,239
Detachable Chassis[2]	15,591	44,877*	4,531	2,918	8,615
Dollies/Converter Gear[3]	4,522	6,759	3,072	1,375	2,816

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly for converting semi-trailer into full trailer in twin trailer doubles operations.
* The 1984 figures for All Others (Special Types), Total Special Types and Detachable Chassis (Total Complete Trailers) were revised in October 1985 by the Department of Commerce. Those figures for 1984 (shown above) are adjusted to reflect the Dept. of Commerce's revision.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

Truck trailers took an expected dip in 1985 to 176,306 units. This bodes well for the 1985 ALCOA trailer forecast of 170,000 units (off 3.4% from projection). The yearly presentation of Alcoa's forecast, long a tradition at the Truck Trailer Manufacturer's Association annual Convention, has been changed. In 1986, Peter M. Toja, vice president, Merrill Lynch Economics presented a "cautiously positive" forecast projecting 160,000 units in 1986 and a slight rise to 170,000 units again in 1987.

The drop in 1985 represents a change of 17.5% from a near record 213,756 units shipped in 1984 which was almost twice a dreary 1983 level of 121,711 units. While the '85 decrease in shipments was spread among different trailers types, drop frame, low-bed, liquid tanks and dump trailers each experienced modest increases. Closed top dry vans dropped 26%, insulated and semi-insulated 21%. The most dramatic decrease, 71%, was in shipments of Detachable Trailers (containers), and Detachable Chassis for those containers, 65%. Converter dollies also dropped 33% confirming a perceived slowdown in the build up of twin trailer operations, mainly by LTL common carriers.

TRENDS & STATISTICS

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Chevrolet	1985	2,261	–	58,878	–	–	1,128	**62,267**
	1984	2,071	–	63,410	–	–	1,295	66,776
Ford	1985	18,673	9,765	12,509	74,675	–	3,848	**119,470**
	1984	19,240	10,619	9,746	64,055	–	1,826	105,486
Freightliner	1985	3,621	13,747	341	–	–	–	**17,709**
	1984	3,623	13,792	399	–	–	–	17,814
GMC	1985	5,236	6,081	24,993	–	–	576	**36,886**
	1984	5,002	9,316	26,344	–	–	769	41,431
International....	1985	640	18,949	956	36,198	–	–	**56,743**
	1984	5	26,440	1,304	30,227	–		57,976
Jeep Corp.	1985	–	–	–	–	–	3,330	**3,330**
	1984	–	–	–	–	–	1,841	1,841
Kenworth	1985	3,177	7,404	220	–	–	–	**10,801**
	1984	4,222	8,943	505	–	–	–	13,670
Mack	1985	156	805	53	–	23,966	159	**25,139**
	1984	256	735	89	–	24,682	139	25,901
Mercedes Benz	1985	–	–	–	–	–	4,516	**4,516**
	1984	–	–	–	–	–	4,453	4,453
Peterbilt	1985	5,109	5,975	238	–	–	–	**11,322**
	1984	6,091	8,323	228	–	–	–	14,642
White	1985	2,348	6,251	1,964	–	–	645	**11,208**
	1984	1,878	5,633	1,648	–	–	740	9,899
Others	1985	284	608	99	–	–		**991**
	1984	105	397	146	–	–	229	877
Total	1985	41,505	69,585	100,251	110,873	23,966	14,202	**360,382**
	1984	42,493	84,198	103,819	94,282	24,682	11,292**	360,766

Source: Motor Vehicle Manufacturers Association.

* International brand trucks from Navistar (previously International Harvester). ** All Others includes: Isuzu, Mercedes, Scania Vabis, Toyo Kogyo, Volvo White, Renault, Mitsubishi, Deutz, Nissan. Reporting firms do not represent entire industry.

The chart below indicates truck factory sales trends over a six year period. Class 6 unit sales dropped 49% since 1981, but the dieselization rate more than doubled to 55.2% from 24.6%. Class 7 factory sales have gradually climbed over the period while the dieselization rate has remained relatively flat at approximately 60%. Still rebounding out of the recession early iln the decade is Class 8 wich remains virtually 100% dieselized. Overall 1985 factory sales of medium and heavy vehicles fell off The only remarkable change in this year's numbers was in combined Class 3 and 4 factory sales which rose out of near oblivion to 19,397 units. MVMA reports these units were sold by Ford. A Ford spokesman said the dramatic rise reflects a technical correction brought about by the elimination of exise tax on Class 3 vehicles.

DOMESTIC TRUCK FACTORY SALES BY GVW

Class 1 (6000 lb and less)						
Total Sales	1,854,901	1,610,835	1,296,644	869,897	583,341	547,426
Diesel Sales	9,663	15,234	25,565	44,586	47,789	68,868
% Diesel	0.5%	0.9%	2.0%	5.1%	8.2%	12.6%
Class 2 (6001-10,000 lb)						
Total Sales	989,633	997,626	787,611	744,350	716,556	679,532
Diesel Sales	123,882	122,995	89,161	72,868	20,393	4,397
% Diesel	12.5%	12.3%	11.3%	9.8%	2.8%	.6%
Class 3-4 (10,001-16,000 lb)						
Total Sales	19,397	5	3	10	263	4,827
Diesel Sales	5,870	-	-	-	-	-
% Diesel	30.3%	-	-	-	-	-
Class 5 (16,001-19,500 lb)						
Total Sales	5,123	5,502	1,143	1,333	1,843	1,761
Diesel Sales	-	-	-	-	-	-
% Diesel	-	-	-	-	-	-
Class 6 (19,501-26,000 lb)						
Total Sales	25,810	29,273	24,310	22,533	50,762	50,124
Diesel Sales	14,253	13,789	9,703	8,559	19,336	12,337
% Diesel	55.2%	47.1%	39.9%	38.0%	38.1%	24.6%
Class 7 (26,001-33,000 lb)						
Total Sales	81,122	74,445	48,896	48,568	41,503	48,728
Diesel Sales	50,492	43,412	29,468	26,282	27,651	30,958
% Diesel	62.2%	58.3%	60.3%	54.1%	66.6%	63.5%
Class 8 (33,001 lb & Over)						
Total Sales	120,941	138,584	78,575	68,040	94,958	99,711
Diesel Sales	120,311	137,692	78,008	67,453	93,769	98,002
% Diesel	99.5%	99.4%	99.3%	99.1%	98.7%	98.3%

TRENDS & STATISTICS

TRUCK FACTORY SALES AND TRUCKS WITH DIESELS

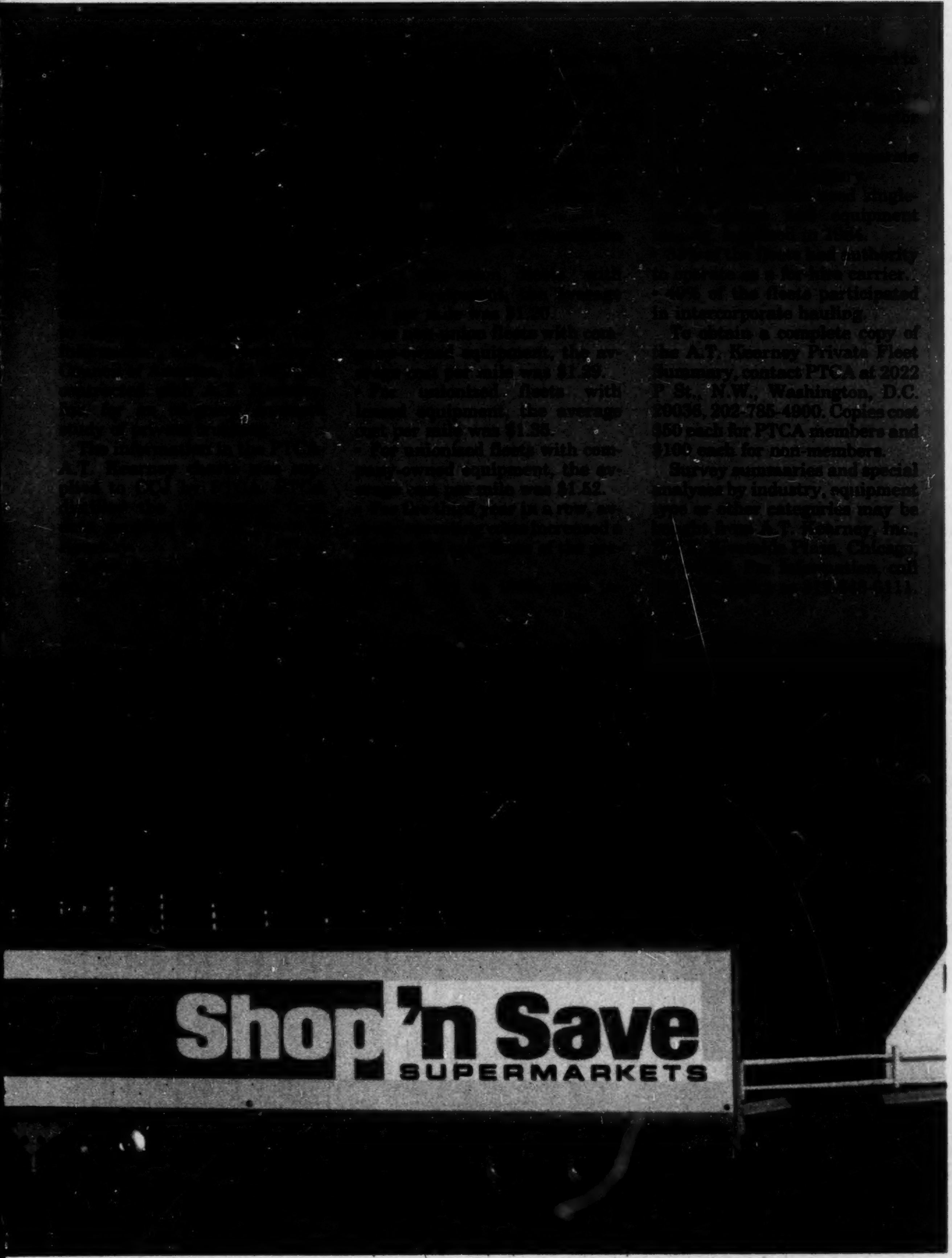
(U.S. domestic only; excluding tactical military vehicles)

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Freight-liner	[illegible]	Jeep	[illegible]	[illegible]	Mercedes-Benz	[illegible]	Volvo White	[illegible]	Total
[illegible]	[illegible]	727,426	177,868	116,213	646,315	–	–	187,079	–	–	–	–	–	–	1,854,901
[illegible]	[illegible]	5,528	2,200	–	1,935	–	–	–	–	–	–	–	–	–	9,663
[illegible]	[illegible]	581,311	143,697	128,364	614,804	–	–	142,659	–	–	–	–	–	–	1,610,835
[illegible]	[illegible]	9,824	3,791	–	1,619	–	–	–	–	–	–	–	–	–	15,234
[illegible]	[illegible]	387,762	98,437	76,314	408,095	–	–	19,025	–	–	–	–	–	–	989,633
[illegible]	[illegible]	49,106	10,776	–	64,000	–	–	–	–	–	–	–	–	–	123,882
[illegible]	[illegible]	377,160	92,692	65,116	440,211	–	–	22,444	–	–	–	–	–	3	997,626
[illegible]	[illegible]	50,549	11,123	–	61,323	–	–	–	–	–	–	–	–	–	122,995
[illegible]	[illegible]	–	–	–	19,397	–	–	–	–	–	–	–	–	–	19,397
[illegible]	[illegible]	–	–	–	5,870	–	–	–	–	–	–	–	–	–	5,870
[illegible]	[illegible]	–	–	–	–	–	–	–	–	–	–	–	–	1	1
[illegible]	[illegible]	–	–	–	–	–	–	–	–	–	–	–	–	–	–
[illegible]	[illegible]	–	–	–	–	–	–	–	–	–	–	–	–	–	–
[illegible]	[illegible]	–	–	–	–	–	–	–	–	–	–	–	–	–	–
[illegible]	[illegible]	–	–	–	–	–	–	–	–	–	–	–	–	4	4
[illegible]	[illegible]	–	–	–	–	–	–	–	–	–	–	–	–	–	–
[illegible]	[illegible]	349	4,774	–	–	–	–	–	–	–	–	–	–	–	5,123
[illegible]	[illegible]	–	–	–	–	–	–	–	–	–	–	–	–	–	–
[illegible]	[illegible]	303	5,188	–	6	–	–	–	–	–	–	–	–	5	5,502
[illegible]	[illegible]	–	–	–	–	–	–	–	–	–	–	–	–	–	–
[illegible]	[illegible]	3,288	3,032	–	7,751	–	9,646	–	–	–	2,093	–	–	–	25,810
[illegible]	[illegible]	413	765	–	1,337	–	9,645	–	–	–	2,093	–	–	–	14,253
[illegible]	[illegible]	3,798	3,282	–	9,820	–	9,771	–	–	–	2,454	–	–	148	29,273
[illegible]	[illegible]	367	853	–	1,965	–	8,002	–	–	–	2,454	–	–	148	13,789
[illegible]	[illegible]	11,540	15,569	–	33,279	–	18,815	–	–	–	1,919	–	–	–	81,122
[illegible]	[illegible]	3,890	6,935	–	18,933	–	18,815	–	–	–	1,919	–	–	–	50,492
[illegible]	[illegible]	11,944	15,570	–	30,366	–	14,888	–	–	–	1,596	–	–	81	74,445
[illegible]	[illegible]	3,433	6,218	–	17,264	–	14,820	–	–	–	1,596	–	–	81	43,412
[illegible]	[illegible]	796	10,581	–	13,937	17,580	20,931	–	10,637	23,333	–	10,996	11,173	977	120,941
[illegible]	[illegible]	595	10,474	–	13,767	17,580	20,779	–	10,637	23,333	–	10,996	11,173	977	120,311
[illegible]	[illegible]	789	14,687	–	14,705	17,773	28,199	–	13,543	24,172	–	14,268	9,824	624	138,584
[illegible]	[illegible]	458	14,500	–	14,463	17,773	28,067	–	13,543	24,172	–	14,268	9,824	624	137,892
[illegible]	[illegible]	1,131,161	310,261	192,527	1,128,774	17,580	49,392	206,104	10,637	23,333	4,012	10,996	11,173	997	3,096,927
[illegible]	[illegible]	59,532	31,150	–	105,842	17,580	49,239	–	10,637	23,333	4,012	10,996	11,173	977	324,471
[illegible]	[illegible]	975,305	275,116	193,480	1,109,912	17,773	52,858	165,103	[illegible]	24,172	4,050	14,268	9,824	866	2,856,270
[illegible]	[illegible]	64,631	36,485	–	96,634	17,773	50,889	–	13,543	24,172	4,050	14,268	9,824	853	333,122

Source: MVMA. Data is factory sales from U.S. plants only and does not include sales of vehicles resulting from joint venture agreements between foreign and domestic suppliers. Volvo White numbers include Autocar. Others include Marmon and Oshkosh. Reporting firms do not represent entire industry. Volvo White declined to break out separate factory sales figures for Class 8 Volvo, White, and Autocar trucks (combined as 11,173 units above). However, the R.L. Polk *U.S. Summary of Truck Service Age Report,* indicates that 12,020 new vehicle registrations were issued for Volvo White trucks in 1985 – of those, 15% were Autocar (1,803); 8½% Volvo (1,022); 76½% White (9,195). That leaves 847 Class 8 units presumed to be in the retail pipeline.

Two years out of the recession, 1985 domestic factory sales of group Class 6, 7 and 8 trucks fell off 5.9% to 227,873 units following a strong 1984 rebound sales level of 242,302 units.

Class 6 sales declined 3,463 units (11.8%), with Ford almost two-thirds of that total (2,069 units – 21%). Class 7 sales increased by 6,677 units (8.9%), with two companies sharing the bulk of the gain: Ford – 2,913 units (9.6%), and International – 3,927 units (26.3%). Class 8 sales declined 17,643 units (12.7%). Volvo White scored the only significant Class 8 sales increase – 1,349 units (13.7%) – while four other builders suffered notable declines: GMC – 4,106 (27.9%); International – 7,268 (25.7%); Kenworth – 2,906 (21.4%); Peterbilt – 3,272 (22.9%).



[illegible] study of private fleets.

The information in the [illegible] A.T. Kearney [illegible]

[illegible] with [illegible] average [illegible] mile was $1.20.

[illegible] fleets with company-owned equipment, the average cost per mile was $1.39.

For unionized fleets with leased equipment, the average cost per mile was $1.55.

For unionized fleets with company-owned equipment, the average cost per mile was $1.52.

[illegible] third year in a row, av- [illegible] increased [illegible]

[illegible] single- [illegible] equipment [illegible] in 1984.

[illegible] the fleets had authority to operate as a for-hire carrier.

40% of the fleets participated in intercorporate hauling.

To obtain a complete copy of the A.T. Kearney Private Fleet Summary, contact PTCA at 2022 P St., N.W., Washington, D.C. 20036, 202-785-4900. Copies cost $50 each for PTCA members and $100 each for non-members.

Survey summaries and special analyses by industry, equipment type or other categories may be bought from A.T. Kearney, Inc., [illegible] Plaza, Chicago, [illegible] information, call [illegible]

PRIVATE FLEETS

[illegible]	[illegible]	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Mileage [illegible]	% [illegible]
Westinghouse Electric Corp	Pittsburgh, Pa.	2568	557	593	4600	4	8322	181	0
Honeywell, Inc	Minneapolis, Minn.	2500	0	0	5678	0	8178	130	100
Goodyear Tire & Rubber	Akron, Oh.	4000	100	100	2500	50	6750	NA	0
Wickes Companies, Inc	Santa Monica, Calif.	983	509	1112	1495	1125a	5224	NA	50
Montgomery Ward & Co	Chicago, Ill.	2500	250	1200	300	0	4250	80	100
N L Industries, Inc	Houston, Tex.	1400	208	514	1375	82	3582	90	2
Air Products & Chemicals, Inc	Allentown, Pa.	340	500	1360	500	170	2870	48	0
National Linen Service	Atlanta, Ga.	2140	14	14	325	0	2493	33	0
Reliance Electric	Cleveland, Oh.	110	25	50	2100c	0	2185	NA	95
Ingersoll-Rand Co Ltd	Woodcliff Lake, N.J.	0	39	132	2010	NA	2181	43	100
Union Carbide Corp, Linde Div	Springfield, N.J.	83	400	1300	337f	0	2120	37	7
Greif Brothers Corp	Delaware, Oh.	40	279	1282	129	0	1730	NA	0
Environmental Industries	Calabasas, Calif.	805	35	420	100	360	1720	NA	0
American Hoechst Corp	Somerville, N.J.	93	12	68	1408	0	1582	40	97.7
Hewlett Packard, S Sales Reg	Atlanta, Ga.	0	0	0	1519	0	1519	27	0
Floyd S Pike Electrical Contractor	Mount Airy, N.C.	828	6	319	30	328	1511	NA	0
American Greetings	Cleveland, Oh.	5	25	60	1400	0	1490	26	NA
Potlach Corp	San Francisco, Calif.	449	241	147	128	415	1380	NA	5.4
Trinity Industries	Dallas, Tex.	7	194	450	25	700	1376	13.6	9
American Linen Supply Co	Minneapolis, Minn.	1330	19	24	0	5	1282	19.3	0
West Point Pepperell Trans. Co.	West Point, Ga.	2	169	646	369	5	1191	26	100
Beckman Instruments	Fullerton, Calif.	22	2	5	1103	NA	1132	41	100
Caterpillar Tractor Co	Peoria, Ill.	300	70	350	400	0	1120	NA	28
CW Wright Construction	Richmond, Va.	700	50	250	21	85	1106	8	0
Hillenbrand Industries, Inc	Batesville, Ind.	275	215	508	79	7	1084	24.3	0
Rite Aid Corp	Harrisburg, Pa.	102	139	281	540	3	1064	9	0
Sully-Miller Contracting Co	Long Beach, Calif.	569	111	226	66	30	1002	NA	9
Texas Industries, Inc	Dallas, Tex.	500	100	100	300	NA	1000	NA	40
Scotty's Inc	Winter Haven, Fla.	350	43	165	36	400b	994	NA	NA
Sears, Roebuck & Co, Dallas Reg	Dallas, Tex.	57	257	622	2	0	938	17	0
Liquid Air Ind, Gases Div	Walnut Creek, Calif.	8	209	700	NA	0	917	16.7g	19
Northrop Aircraft Div	Hawthorne, Calif.	269d	16	49	78	409	904e	3.3	1
Western Auto Supply	Kansas City, Mo.	0	240	494	164	0	902	16.4	0
Brad Ragan, Inc	Spruce Pine, N.C.	662	18	88	100	NA	868	NA	0
Growmark, Inc	Bloomington, Ill.	5	123	679	0	0	867	10.5	7
USS Agricultural Chemicals	Atlanta, Ga.	230	60	230	125	170	815	NA	10
Riedel International	Portland, Ore.	222	18	152	190c	226	808	NA	NA
Johnson Controls Battery Div	Milwaukee, Wisc.	0	234	570	0	0	804	13.3	0
WOM Enterprises, Inc.	Miami, Fla.	527	0	0	251	0	778	19.3	15
TG&Y Stores Co	Oklahoma City, Okla.	3	136	444	174	0	757	20	100
Grossmans Div, Evans Products	Braintree, Mass.	150	22	65	175	350	750d	7.7	5
Cianbro Corp	Pittsfield, Me.	119	14	83	3	521	740	NA	5
Linder Industrial Machinery Co	Lakeland, Fla.	62	3	3	100	550	718	5	0
Aluminum Co of America	Pittsburgh, Pa.	0	81	626	0	0	707	7.8	12
Continental Can Co	Oak Brook, Ill.	0	116	548	NA	NA	664	7.9	NA
James Julian, Inc	Wilmington, Del.	128	21	89	16	410	664	NA	0
Union Camp Corp	Wayne, N.J.	0	152	318	0	0	470	NA	0

* — does not include cars; a — light trucks; b — includes lift trucks; c — includes light trucks; d — includes some miscellaneous equipment; e — includes 83 miscellaneous vehicles; f — light pick-ups; g — trucks only; NA — not available

PRIVATE FLEETS

OPERATING STATISTICS (PTCA - A.T. KEARNEY)

Description	Straight Truck/Van 1984	1985	Mixed Fleet 1984	1985
Miles Driven	20,720,000	30,045,000	175,111,000	150,219,000
Average Miles/Trip	146	303	520	451
Number Of Drivers	1,491	1,524	5,625	2,919
Miles Per Driver	30,000	57,100	52,200	55,800
Number Of Tractors	53	215	2,908	1,740
Number Of Straight Trucks/Vans	1,643	2,068	5,438	1,360
Percent Total Empty Tractor Miles	28	23	23	26
Trailer To Tractor Ratio	4.7	1.4	2.2	2.0
Average Miles Per Tractor	52,000	48,500	67,000	69,300
Average Miles Per Straight Truck	24,800	31,800	26,500	29,800
Average Miles Per Van	20,600	21,500	18,700	16,600

Because of small sample size and fleet definition, care should be used when referencing these statistics.

OPERATING STATISTICS (PTCA - A.T. KEARNEY)

Description	Tractor/Trailer 1984	1985
Miles Driven	1,496,500,000	1,463,600,000
Average Miles Per Trip	921	911
Number Of Drivers	21,971	20,822
Miles Per Driver	78,600	79,100
Number Of Tractors	16,366	15,067
Number Of Straight Trucks/Vans	210	175
Percent Total Empty Tractor Miles	21	22
Trailer To Tractor Ratio	2.6	2.6
Average Miles Per Tractor	100,600	101,900
Average Tractor Age	3	3
Average Tractor M.P.G.	5.5	5.6
Power Units/Mechanic Ratio*	5.2	5.3
Union/Non-union Fleets	177/262	185/284
Leased/Owned Equipment	282/123	278/150

* For companies that perform 90% or more of their own maintenance

PRIVATE FLEETS

Peterson, Howell & Heather	Baltimore, Md.	58,408	e	3658	171,152	8971	242,189
Dart & Kraft Financial Corp	Minneapolis, Minn.	23,500	2500	4500	70,000	NA	100,500
Ryder Truck Rental (a)	Miami, Fla.	46,072	21,603	17,618	1862	0	87,155 (k)
Automotive Rentals, Inc.	Maple Shade, N.J.	19,830	450	650	44,070	e	65,000
Lend Lease	Minneapolis, Minn.	600	5700	1200	50,000	0	57,500
Leaseway Transportation	Cleveland, Oh.	11,000	4600	5500	NA	29,000	52,000 (i)
Enterprise Leasing Co	St. Louis, Mo.	3000	250	0	48,000	150	51,500
Gelco-TIP Trailer Leasing	Bala Cynwyd, Pa.	0	0	43,000	0	0	43,000
Hertz-Penske Truck Leasing	Parsippany, N.J.	12,900	7900	4000	3000	0	27,800
Amtralease	Cherry Hill, N.J.	7428	9433	5642	677	0	23,180
McDonnell Douglas Leasing (h)	Long Beach, Calif.	2200	2400	12,500	2000	600	19,700
Transamerica Trailer Services	Piscataway, N.J.	0	0	15,144	0	0	15,144
Rollins Leasing Corp	Wilmington, Del.	3100	6300	4600	0	0	14,000
All-State Vehicles, Inc	Long Island City, N.Y.	800	0	0	13,000	0	13,800
Gelco Truck Leasing	Chesterfield, Mo.	3000	6700	3500	500	0	13,700
Ruan Trans. Mgt. Systems	Des Moines, Ia.	620	5515	6010	1000	0	13,145
Evans Products, Trans Div	Miami, Fla.	0	0	13,000	0	0	13,000
AJF Leasing	St. Louis, Mo.	0	0	11,000	0	0	11,000
Transamerica Corp (d)	San Francisco, Calif.	240	0	6875	2480	0	9,495
Trucklease Corp	Worcester, Mass. (j)	1980	851	835	5000	0	8666
Farm Credit Leasing Services	Minneapolis, Minn.	1812	1302	2841	2408	91	8554
Saunders System, Inc	Birmingham, Ala.	1000	4000	3000	NA	0	8000
PLM Transportation Equipment	San Francisco, Calif.	0	156	7061	0	0	7217
Chancellor Fleet Corp	Boston, Mass.	155	2245	2490	0	0	4890
Transportation Leasing Co	Tulsa, Okla.	960	40	48	1980	18	3046
Leslie Leasing Co	San Francisco, Calif.	650	40	55	2100	0	2845
Immke Circle Leasing	Columbus, Oh.	100	0	3	2612	0	2715
Lily Truck Leasing Corp	Boston, Mass.	1155	754	727	40	5	2681
Mendon Leasing Corp	Brooklyn, N.Y.	2300	e	0	300	0	2600
Phill Baumgarten Motors, Inc (g)	Ft. Lauderdale, Fla.	121	703	1411	76	0	2311
Transervice Lease Corp	Lake Success, N.Y.	1200	262	581	56	120	2209
Leaseco Truck Rental	Nashville, Tenn.	133	901	880	225	0	2139
United Truck Leasing Corp	Braintree, Mass.	1012	697	209	29	0	1947
Action Mobile Office Rentals	Carson, Calif.	8	7	1900	6	6	1927
Edart Truck Rental Corp	Hartford, Conn.	600	575	500	40	2	1717
Highway Leasing Co	Needham, Mass.	50	0	0	1300	0	1350
DeCarolis Truck Rental	Rochester, N.Y.	410	162	815	20	5	1412
Gordon Thompson Industries	Jacksonville, Fla.	5	0	0	1250	0	1255
Salem Leasing Corp	Winston-Salem, N.C.	79	441	689	0	0	1209
Motor Transportation Co	St. Louis, Mo.	214	553	155	0	0	922
Doerrs Trailer Leasing (f)	Orlando, Fla.	0	2	850	1	2	855
HUB Truck Rental, NY Reg	Farmingdale, N.Y.	727	98	0	22	0	847
Lease Line, Inc	N. Brunswick, N.J.	56	148	610	18	0	832
Carpet Center Leasing	Dalton, Ga.	19	293	496	12	0	820
Commercial Equipment Co	Charlotte, N.C.	4	293	432	3	0	732
Hunsaker Truck Lease, Inc	Dallas, Tex.	120	260	240	0	0	630
Rice & Holman Leasing	Pennsauken, N.J.	200	0	0	400	0	600
Servitor, Inc	Ft. Lauderdale, Fla.	323	37	25	51	10	446

a—does not include foreign-based vehicles; b—utility-type vehicles only; c—does not include service fleet or car fleet; d—does not include Budget Rent-A-Car or Transamerica Interway trailer leasing; e—included in "Trucks;" f—regional fleet figures, not national; g—includes leasing division and vehicles operated by Baumgarten Transportation Co. Inc.; h—includes Brind Leasing Corp. vehicles; i—includes additional vehicles not specified; j—Trucklease cars controlled by Auto Rental Corp. Both are subsidiaries of Automotive Management, Inc.; k—Includes 47 buses; NA—not available.

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TRACTOR-TRAILER DRIVER AND MECHANIC WAGE RATES

(PTCA - A.T. KEARNEY)

Category	Company				Leased			
	Non-union		Union		Non-union		Union	
	1984	1985	1984	1985	1984	1985	1984	1985
Driver Wage Per Hour	$9.19	$9.34	$10.36	$10.88	$8.89	$9.31	$11.02	$10.96
95% Confid. Interv.	*.35	*.36	*.37	*.31	*.54	*.62	*.47	*.43
Per Mile Single	$0.25	$0.26	$0.26	$0.27	$0.25	$0.25	$0.27	$0.28
95% Confid. Interv.	*.01	*.01	*.01	*.01	*.02	*.01	*.01	*.01
Team	$0.16	$0.15	$0.15	$0.15	$0.14	$0.14	$0.15	$0.15
95% Confid. Interv.	*.01	*.01	*.01	*.01	*.01	*.01	*.01	*.01
Mechanic	$10.06	$10.19	$10.91	$11.41	$15.78	$16.26	$15.96	$18.10
95% Confid. Interv.	*.54	*.72	*.49	*.46	*4.19	*3.27	*4.09	*4.65

* – plus or minus

TRACTOR-TRAILER DRIVERS (PTCA - A.T. KEARNEY)

Driver Category	COST PER MILE									
	General and Administrative		Drivers		Equipment		Total*		95% Confidence Interval (plus/minus)	
	1984	1985	1984	1985	1984	1985	1984	1985	1984	1985
Company, non-union	$0.08	$0.08	$0.51	$0.52	$0.68	$0.69	$1.27	$1.29	$.07	$.07
Company, union	$0.08	$0.10	$0.66	$0.70	$0.70	$0.72	$1.44	$1.52	$.10	$.09
Leased, non-union	$0.07	$0.07	$0.49	$0.51	$0.63	$0.62	$1.19	$1.20	$.11	$.09
Leased, union	$0.09	$0.07	$0.62	$0.60	$0.69	$0.68	$1.39	$1.35	$.14	$.14

* – numbers may not add; They represent average costs for companies that provided information for the category shown.

TRACTOR-TRAILER EQUIPMENT (PTCA - A.T. KEARNEY)

Driver Category	COST PER MILE									
	General and Administrative		Drivers		Equipment		Total*		95% Confidence Interval (plus/minus)	
	1984	1985	1984	1985	1984	1985	1984	1985	1984	1985
Owned	$0.10	$0.10	$0.61	$0.64	$0.65	$0.68	$1.35	$1.42	$.08	$.08
Leased	$0.07	$0.07	$0.54	$0.55	$0.69	$0.69	$1.28	$1.31	$.06	$.06
Mixed	$0.11	$0.09	$0.67	$0.65	$0.74	$0.68	$1.52	$1.43	$.22	$.20

Type Equipment	Average Miles Per Trip		Average Miles Per Driver		Average Miles Per Tractor	
	1984	1985	1984	1985	1984	1985
Owned	701	696	70,200	69,400	84,900	84,500
Leased	1037	1040	83,400	85,300	109,600	113,800
Mixed	751	825	69,200	73,600	82,500	85,600

* – numbers may not add; They represent average costs for companies that provided information for the category shown.

PRIVATE FLEETS

Fleet	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Other Vehicles	Total Vehicles	Annual Mileage (millions)	% Leased
ARA Services (a)	Philadelphia, Pa.	4935	2635	5715	2735	1154	17,174	423.1	.02
Continental Baking	St. Louis, Mo.	9026	611	727	402	16	10,782	182.1	55
Safeway Stores	Oakland, Calif.	0	1979	4423	1000	471	7873	68.5	0
Nabisco Brands, USA	East Hanover, N.J.	1500	57	119	4400	0	6076	120	3
Interstate Brands Corp	Kansas City, Mo.	4005	393	498	5	0	4901	98	0
Fleming Companies	Oklahoma City, Okla.	211	1257	2080	821	NA	4369	95	3
Super Valu Stores	Minneapolis, Minn.	9	1201	2301	703	93	3913	58	0
General Cinema Beverages	Chestnut Hill, Mass.	1650b	260	310	300	430	3500	34	0
Land O'Lakes, Inc	Minneapolis, Minn.	453	257	707	900b	800	3117	NA	80
American Bakeries Co	New York, N.Y.	2300	224	325	NA	0	2849	54	6
Wetteran, Inc	Hazelwood, Mo.	20	628	1168	650	2	2468	31	1
The Southland Corp	Dallas, Tex.	868	700	851	0	0419	2419	56	7
Wakefern Food Corp	Elizabeth, N.J.	0	450	1500	250	0	2200	25	c
Holly Farms Poultry Ind	Wilkesboro, N.C.	208	416	749	184	272	2098	37	0
Stroehmann Bakeries, Inc	Williamsport, Pa.	1306	250	348	189	0	2093	39	25
General Foods Corp	White Plains, N.Y.	0	42	200	1967	0	1990	6e	17
Tyson Foods, Inc	Springdale, Ariz.	127	393	705	456b	190	1871	26	.24
Campbell Taggart, Inc	Dallas, Tex.	50	658	850	100	0	1658	42	30
Arnold Foods	Greenwich, Conn.	1200	95	120	160	NA	1579	38	10
Giant Food, Inc	Landover, Md.	260	205	1092	20	0	1577	10.8	0
Acme Markets	Philadelphia, Pa.	12	254	1074	150	0	1490	10.5	NA
General Mills	Minneapolis, Minn.	25	8	12	1389	0	1425	31	98
Kraft, Inc.	Skokie, Ill.	400	405	578	NA	0	1383	NA	50
Beatrice Foods, Bottled Water Div	Los Angeles, Calif.	892	52	79	79	104	1296	39.4	60
Entenmann's, Inc	Bay Shore, N.Y.	925	10	105	240	5	1285	30	0
Houston Coca-Cola Bottling	Houston, Tex.	193b	169	208	188	161	1270	13	0
Beverage Management	Columbus, Oh.	569	165	227	256	0	1217	22	.03
Pacific Gamble Robinson (d)	Kirkland, Wash.	499	131	148	254	111	1143	17.7	0
H.E. Butt Grocery Co	Corpus Christi, Tex.	11	209	712	191	0	1123	24.5	0
Foremost Dairies, Inc	San Francisco, Calif.	490	200	250	150	NA	1090	NA	0
Stop & Shop Companies	Boston, Mass.	2	158	782	85	0	1027	23.2	39
Thomas J Lipton, Inc	Englewd. Cliffs, N.J.	100	3	10	850	6	969	18	0
Central Soya Co	Fort Wayne, Ind.	76	124	223	328	199	950	11	86
Vons Grocery Co	El Monte, Calif.	49	217	682	2	0	950	12.5	0
Hartz Mountain Corp	Harrison, N.J.	582	26	32	270	0	910	33	80
Northrup King Co	Minneapolis, Minn.	340	1	25	180	350	896	14	0
Martin Brower Co	Des Plaines, Ill.	0	325	515	18	NA	858	37	85
Metz Baking Co	Sioux City, Ia.	668	67	79	2	0	816	18	0
Drake Bakeries, Inc	Wayne, N.J.	620	18	41	47	0	726	9.3	0
Sweet Life Foods	Suffield, Conn.	4	140	317	225	9	695	12	20
Peter Eckrich & Sons	Fort Wayne, Ind.	340	36	63	200	0	639	17	0
Mana Pro Corporation	Los Angeles, Calif.	124	44	214	150	NA	602	7.3	0
Armour Food Co	Omaha, Neb.	99	80	89	312	0	580	19.6	45
Pepperidge Farm, Inc	Norwalk, Conn.	15	101	154	277	3	550	15.5	100
Chas Freihofer Baking	Troy, N.Y.	404	22	55	48	20	549	8.5	0

* — does not include cars; a — includes Smith's Transfer, magazine/book division and school bus operations; b — includes pick-up trucks; c — 100% of tractors & 20% of trailers; d — not including wholly-owned-subsidiary fleets; e — trucks only; f — 80% tractors & 8% trailers leased; NA — not available

PRIVATE FLEETS

SINGLE SOURCE and TRIP LEASING (PTCA - A.T. KEARNEY)

[illegible]	[illegible]				[illegible]			
Trucking Operation	Number		% Total		Number		% Total	
	1984	1985	1984	1985	1984	1985	1984	1985
Tractor-Trailer	47	75	11%	16%	20	14	7%	5%

[illegible]	[illegible]				[illegible]			
Trucking Operation	Number		% Total		Number		% Total	
	1984	1985	1984	1985	1984	1985	1984	1985
Tractor-Trailer	113	100	26%	21%	29	23	13%	8%

[illegible]	[illegible]				[illegible]			
	Number		% Total		Number		% Total	
	1984	1985	1984	1985	1984	1985	1984	1985
Tractor-Trailer	75	68	17%	14%	12	5	5%	2%
Mixed Fleet	8	11	12%	18%	4	1	11%	2%
Straight Truck/Van	1	2	7%	8%	0	1	0%	5%

TRACTOR-TRAILER COST PER MILE BY REGION (PTCA - A.T. KEARNEY)

[illegible]	[illegible]		[illegible]		[illegible]		[illegible]		[illegible]	
	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Rocky Mountain	$.08	$.08	$.55	$.60	$.66	$.67	$1.28	$1.35	$.08	$.08
Southwest	$.07	$.07	$.50	$.50	$.63	$.62	$1.21	$1.19	$.04	$.03
Northern Plains	$.08	$.07	$.52	$.51	$.65	$.63	$1.24	$1.21	$.04	$.03
Midwest	$.08	$.08	$.53	$.54	$.66	$.66	$1.26	$1.27	$.04	$.04
Southeast	$.07	$.07	$.48	$.49	$.63	$.63	$1.19	$1.20	$.03	$.03
Middle Atlantic	$.08	$.08	$.53	$.54	$.66	$.67	$1.27	$1.27	$.04	$.04
Northeast	$.08	$.08	$.51	$.52	$.65	$.65	$1.24	$1.25	$.05	$.04
Continental USA	$.08	$.08	$.50	$.50	$.64	$.62	$1.21	$1.20	$.06	$.04
Canada	$.08	$.08	$.48	$.48	$.63	$.62	$1.18	$1.18	$.04	$.04

* – numbers may not add; They represent average costs for companies that provided information for the category shown.

PRIVATE FLEETS

GTE Service Corp	Irving, Tex.	25,700c	150	725	8410	NA	34,985	380	8
Southwestern Bell Telephone	St. Louis, Mo.	15,470c	12	NA	4405	0	19,887	175	0
Pacific Bell	San Francisco, Calif.	12,543	28	28	3107	NA	15,678	156	0
Pacific Gas & Electric	San Francisco, Calif.	8700	100	3800	2900	80	15,500	NA	0
Florida Power & Light	Miami, Fla.	2914c	43	980	4174	487	8598	NA	NA
New England Telephone	Boston, Mass.	5497c	14	18	2100	0	7629	81	4
Southern California Edison	Pomona, Calif.	3553	80	1087	1967	813	7500	60	100
American Elec. Power System	Columbus, Oh.	4130	45	130	2040	510	6855	68	98
Southern California Gas Co	Los Angeles, Calif.	4506	12	298	1296	570	6682	52	100
Duke Power Co	Charlotte, N.C.	2800	77	1150	1150	1050	6227	64	0
General Public Utilities	Parsippany, N.J.	2598	25	1145	1311	659	5738	46	60
LA Dept Water & Power	Los Angeles, Calif.	2900	39	344	1212	1003	5498	48	9
Public Service Elec & Gas	Newark, N.J.	2416a	10	659	1723	524	5404	36.3	0
Consumers Power Co	Jackson, Mich.	2987	40	913	792	518	5250	42	80
Niagara Mohawk Power Corp	Syracuse, N.Y.	2684	30	928	721	462	4825	39.2	81
Commonwealth Edison	Maywood, Ill.	1833	45	712	1647	165	4402	45	1
Con Edison of NY	Astoria, N.Y.	2576	25	199	1100	433	4330	5	0
AT&T Information Services	Denver, Colo.	180	2	2	4000	20	4204	NA	0
Columbia Gas Distribution	Columbus, Oh.	1873	8	214	888	611	3594	41	100
N Indiana Public Service	Hammond, Ind.	1781	22	668	595	889	3287	21	11
ARKLA, Inc	Shreveport, La.	1497	33	748	402	603	3283	31	0
Pennsylvania Power & Light	Allentown, Pa.	1295	32	698	925	220	3170	22	100
S New England Telephone	New Haven, Conn.	1871	7	200	1212	NA	3083	27.8	0
Long Island Lighting Co.	Hicksville, N.Y.	1357	13	435	687	375	2967	14	0
Public Service Co of CO	Denver, Colo.	1594	18	531	445	345	2933	23.4	0
Detroit Edison	Detroit, Mich.	1500	60	600	400	225	2928	30	90
Northern States Power Co	Minneapolis, Minn.	1460	11	403	951	15	2840	14	0
Arizona Public Service Co	Phoenix, Ariz.	1405	16	420	662	279	2782	24	5
Philadelphia Electric	Berwyn, Pa.	1416	22	473	737	23	2671	16	100
Illinois Power	Decatur, Ill.	989	5	481	367	381	2623	12	0
San Diego Gas & Electric	San Diego, Calif.	1326	60	284	660	133	2463	24	0
Baltimore Gas & Electric	Baltimore, Md.	903	17	32	1454	21	2427	23	20
Central Telephone Co	Chicago, Ill.	1721	0	60	668	54	2404	28	4
Appalachian Power Co	Roanoke, Va.	1081	7	355	429	180	2052	22	98
Jersey Central Power & Light	Morristown, N.J.	948b	8	522	370	183	2031	18	66
General Telephone of NW	Everett, Wash.	1363a	11	88	651	0	2025	19.4	4
Northern Illinois Gas	Naperville, Ill.	989	3	215	497	281	1985	24	0
Cincinnati Gas & Electric	Cincinnati, Oh.	815	14	341	541	184	1895d	16	0
Oklahoma Gas & Electric	Oklahoma City, Okla.	940	25	322	222d	325	1834d	16	0
Pacific Power & Light	Portland, Ore.	1180	7	332	253	9	1781	NA	85
Illinois Bell Telephone Co	Springfield, Ill.	255	96	406	943	0	1700	NA	0
Salt River Project	Phoenix, Ariz.	921	19	205	273	273	1691	14.1	0
Public Service Indiana	Plainfield, Ind.	772	8	425	300	141	1646	15	85
Memphis Light, Gas & Water	Memphis, Tenn.	825	10	185	215	398	1633	11	0
Michigan Consolidated Gas	Detroit, Mich.	896	6	103	490	128	1623	19	0

* — does not include cars; a — includes vans; b — includes 464 pick-up trucks; c — includes vans and light trucks; d — does not include contract cars; NA — not available.

Circle 50 on Inquiry Card →

PRIVATE FLEETS

PRIVATE FLEET OPERATING COSTS (PTCA - A.T. KEARNEY)

Cost Category	Tractor-Trailer Cost Per Mile	
	1984	1985
General And Administrative	$0.08	$0.08
Drivers	$0.57	$0.59
Equipment	$0.68	$0.69
Total*	$1.32	$1.35
Sample Size	419	458
95% Confidence Interval**	$1.27 to $1.37	$1.30 to $1.40

*—numbers may not add. They represent average costs for those companies that provided information for the category shown; **—with 95% confidence, the average will fall within the range shown.

PRIVATE FLEET OPERATING COSTS (PTCA - A.T. KEARNEY)

	COST PER MILE			
Cost Category	Straight Truck/Van		Mixed Fleet	
	1984	1985	1984	1985
General/Administrative	$0.16	$0.10	$0.14	$0.22
Drivers	$1.22	$0.73	$0.82	$0.78
Equipment	$0.77	$0.70	$0.72	$0.60
Total**	$2.15	$1.50	$1.66	$1.48
Sample Size	11	57	57	17
95% Confidence Interval	$1.03 to $3.27	$1.33 to $1.67	$1.44 to $1.88	$1.10 to $1.86

*—because of small sample size and fleet definition, care should be taken when referencing these operating costs; **—numbers may not add. They represent average costs for companies that provided information for the category shown.

INTERCORPORATE AND TOTO AUTHORITY (PTCA - A.T. KEARNEY)

	NUMBER OF RESPONDENTS			
Trucking Operation	Participate In Intercorporate Hauling			
	Number		% Total	
	1984	1985	1984	1985
Tractor-Trailer	214	231	49%	49%
Mixed Fleet	25	18	38%	30%
Straight Truck/Van	4	5	27%	20%

	TOTO AUTHORITY							
	Currently Have				Applying For			
	Number		% Total		Number		% Total	
	1984	1985	1984	1985	1984	1985	1984	1985
Tractor-Trailer	118	154	27%	33%	44	41	20%	18%
Mixed Fleet	6	13	9%	21%	5	5	13%	15%
Straight Truck/Van	1	2	7%	8%	0	1	0%	5%

PRIVATE FLEETS

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Atlanta, Ga.	953	38	134	1385b	2652	5126	NA	NA
Phoenix, Ariz.	1749	225	199	1520	539	4232a	33.5	0
Dallas, Tex. Equip Services Dept	1798	42	136	1559b	422	4029a,c,i	44	0
San Francisco, Calif.	911	31	18	1050b	1404	3414	NA	0
Cleveland, Oh.	1220	6	140	1070c	712	3148	16	0
Baltimore, Md.	1312	15	13	1400c	385	3125	NA.	0
Austin, Tex.	1095e	61	180	808c	540	2684	9.5	0
San Antonio, Tex.	1105	33	42	790	402	2372	35	0
Kansas City, Mo.	1123	59	27	620	402	2231	NA	0
Charlotte, N.C.	365	2	2	833	141	1765a	15.5	0
Long Beach, Calif.	588	4	78	640	252	1562	NA	0
Baton Rouge, La.	591	126	40	750	19	1526	NA	2
San Diego, Calif.	1080	75	75	90	150	1470j,l	13	0
San Jose, Calif.	487	31	66	518	364a	1466b	12.3	0
Sacramento, Calif.	329	5	200	715f	150	1399	10.9	.1
Corpus Christi, Tex.	683n	118	69	379	137	1386	12.6o	0
Norfolk, Va.	570	5	26	450	300	1350	7	0
Lexington, Ky.	403	61	11	585	251	1311	9	.5
Salt Lake City, Ut.	320	235	40	400b	297	1292	7	0
Clearwater, Fla.	397	11	56	310	498	1272a	4	0
Anaheim, Calif.	362	1	91	317	496	1267	5.4	9
Tallahassee, Fla.	586	8	109	255	216	1174	9.1	0
Louisville, Ky.	348	77	42	664	0	1131	NA	NA
Greensboro, N.C.	217g	6	115	508a	256b	1121	10	0
Newport News, Va.	497	2	86	367	164m	1116	NA	0
Jackson, Miss.	450	20	20	500	125	1115	NA	0
Shreveport, La.	320	0	55	353	281	1109	NA	0
Riverside, Calif.	462	2	87	225	167	1040a,b,c	NA	0
Orlando, Fla.	407	63	138	396	28	1032	NA	0
Honolulu, Hi.	645	19	72	204	87	1027	NA	0
LA, Calif. Fire Dept	513	75	75	304	10	977	NA	0
Lubbock, Tex.	237e	50	169	361b	287	969	7	0
El Paso, Tex.	570	16	18	55	290a,h	949	NA	0
Ft. Lauderdale, Fla.	361	16	177	400	47	945	4.2	0
Raleigh, N.C.	424	1	70	325	96	916	8.2	0
Winston-Salem, N.C.	359	3	27	388	121	898	7.1	0
Montgomery, Ala.	355	1	2	316	73	865a	NA	0
Knoxville, Tenn.	366	5	22	347	117	857	14	54
Rochester, N.Y.	340	1	29	345	98	813j	7	0
Hampton, Va.	287	2	13	240b	155	795a	NA	0
Pontiac, Mich.	175	1	28	102j,l	488a	794,c,d	NA	.007
Savannah, Ga.	358	1	1	318	88	766	NA	0
Little Rock, Ariz.	323	2	12	269c	135	741	5.4	0
Portsmouth, Va.	245	35	49	263b	140	735jk	NA	0
Roanoke, Va.	300	10	20	204	157	691k	NA	0
Chesapeake, Va.	160	3	18	340	125	646	7	0

* — does not include cars; # — may not include all departments; a — includes miscellaneous vehicles; b — includes police fleet; c — includes motorcycles; d — does not include education or fire dept; e — includes fire trucks; f — includes 340 light trucks; g — does not include water or fire dept; h — does not include fire, police, health or water depts; i — does not include public transit or fire dept; j — does not include fire dept; k — does not include school bus fleet; l — does not include police dept; m — includes street maintenance equipment; n — includes 59 vans and 9 ambulances; o — excluding transit; NA — not available.

PRIVATE FLEETS

[illegible]	[illegible]	Straight [illegible]	[illegible]	[illegible]	[illegible]	Off [illegible]	Total [illegible]	[illegible]
North Carolina DOT/Hwy Div	Raleigh	5542	101	862	0	11,641	18,146	65
Texas Hwy & Public Trans	Austin	6804	113	166	1153	9485	17,721	93
California DOT	Sacramento	4733	75	295	3069	4186	12,795	NA
Massachusetts Motor Vehicle Management Bureau	Boston	3486	0	0	3311	2628	9425	NA
Pennsylvania DOT	Harrisburg	4362	58	238	676	3836	9170	NA
Virginia Hwy & Trans Dept	Richmond	3837	55	69	2700	2494	9155	NA
Georgia DOT	Atlanta	1389	54	375d	632	6521	8971	NA
Kentucky Trans Cabinet	Frankfort	6000	15	25	1592	500	8132	76
Florida DOT	Tallahassee	2791	61	402	1347	2498	7099	75
New York DOT	Albany	2294	72	329	2325	1912	6932	56
Ohio DOT	Columbus	3500	25	25	1200	1200	5950	6
Missouri DOT/Hwy Dept	Jefferson City	2431b	8	16	610	2783	5848	NA
Michigan Management/Budget Dept, Motor Trans Div	Lansing	1040	11	3	4623	6	5683	NA
South Carolina Hwy/Public Trans	Columbia	2611	162	349	1664	0	4786	NA
Oregon DOT/Hwy Div	Salem	945	34	241	1132c	2357	4709	18.5
Arkansas Hwy. Trans. Dept.	Little Rock	1848	77	54	283	2353	4615	NA
Illinois DOT	Springfield	3175c	12	300	821	0	4308	59
Indiana Hwy Dept	Indianapolis	1146	16	15	1728b	934	3839	42
Iowa DOT	Ames	2112	12	12	507	886	3529	22
Kansas DOT	Topeka	1458	16	71	234	1143	2851	NA
D.C. Dept of Pub Works	Washington	1810	40	400	250	200	2700	1
Arizona DOT	Phoenix	587	19	248	1287a	330	2471	26
Maryland Hwy Admin	Baltimore	950	14	16	250	1000	2230	NA
Minnesota DOT	St. Paul	1000a	40	150	310	700	2200	8.5
Oklahoma DOT	Oklahoma City	651	13	197	189	1091	2141	NA
Connecticut DOT	Wethersfield	1289	35	55	420	325	2124	NA
Tennessee Dept. Gen. Ser.	Nashville	624	10	0	1157	238	2025	NA
Montana Hwy Dept	Helena	1103b	45	154	81	565	1944	15
West Virginia Hwy Dept	Charleston	640	18	195	384	646	1883	NA
Utah DOT	Salt Lake City	1077c	12	84	215	399	1787	22
South Dakota DOT	Pierre	912	9	65	132	476	1575	NA
Wisconsin Dept of Admin	Madison	5	0	0	1495	0	1500	27
Colorado Dept. Highways	Denver	200	50	0	800	300	1350	NA
Alabama Dept. Pub. Safety	Montgomery	20	5	0	1200	0	1225	NA
Washington Dept. Nat. Resources	Olympia	771	7	160	104	128	1202	NA
New Jersey Turnpike Auth.	Hightstown	350	4	81	250	450	1135	NA
Nebraska Dept. Roads	Lincoln	525	67	53	325	0	970	NA
Maine DOT/Motor Trans Ser	Augusta	239	15	6	453a	197	939	18
Delaware DOT	Dover	339	10	12	231	341	933	NA
New Hampshire Hwy Pub Works	Concord	507b	2	8	218	131	866	10
Idaho DOT	Boise	576	17	37	105	NA	735	22
North Dakota Hwy. Dept.	Bismarck	119	19	17	483	44	682	NA
Hawaii DOT	Honolulu	278	9	9	118	52	466	NA
New Mexico Hwy. Dept.	Roswell	130	3	116	29	166	444	NA
Louisiana DOT	Monroe	267	18	10	31	114	440	NA
Alaska DOT	Juneau	160	60	5	205	0	430	NA
Mississippi Hwy. Dept.	Newton	150	5	5	2	150	312	NA

* – does not include cars; # – may not include all departments; a – includes pickup trucks; b – includes pick-ups and vans; c – includes pick-up trucks, vans and miscellaneous vehicles; d – includes 225 utility trailers; NA – not available.

PRIVATE FLEETS

[illegible]	[illegible]	Straight [illegible]	[illegible]	[illegible]	[illegible]	Off [illegible]	Total [illegible]	[illegible] Mileage [illegible]	% [illegible]
Phillips Petroleum	Bartlesville, Okla.	3704	146	1066	907	1483	7306	NA	0
Tenneco, Inc	Houston, Tex.	2900f	200	450	3400	150	7100	NA	75
Dowell Schlumberger	Houston, Tex.	1072	918	1374	2000a	NA	5367	6.0	NA
Conoco Inc	Houston, Tex.	2000	365	650	1000	800	4815	NA	0
Arco Oil & Gas	Dallas, Tex.	1056	56	378	873	554	2917	38	0
Petrolane, Inc	Long Beach, Calif.	2445	123	180	80	0	2828	NA	14
Big Three Industries, Inc	Houston, Tex.	1086	775	640	NA	NA	2501	7	0
Gulf Oil Mkt Dept (g)	Houston, Tex.	136	361	446	1275	72	2290	b	0
Exxon Co USA	Houston, Tex.	340	284	299	765	0	1688	NA	0
Texaco Refining & Mkt, Inc	Houston, Tex.	47	152	179	842	NA	1220	30.5	98
Amerigas, Inc	Valley Forge, Pa	350	150	225	335	0	1050	22	65
Welltech, Inc	Houston, Tex.	670	46	53	107	320	1196	30.7	60
Natural Gas Pipeline Co of Am	Lombard, Ill.	526	72	105	361	0	1064	14	0
Transco Energy Co	Houston, Tex.	455	12	106	422	50	1045	15	0
Sun Refining & Mkt Co	Philadelphia, Pa.	92	162	272	400	56	982	69.7d	30
Mobil Oil Corp (c)	Fairfax, Va.	50	310	410	0	160	930	22.0	5
Halliburton Services	Wichita, Kan.	70	170	312	87	86	725	NA	0
Meenan Oil Co	Hicksville, N.Y.	490	40	35	94	6	665	NA	0
Union Oil Western Region Mkt	Los Angeles, Calif.	68	80	90	360	0	598	17	0

* — does not include cars; a — includes pick-up trucks; b — trucks: 42 million. cars: 40 million; c — marketing dept only; d — trucks only; f — includes light trucks and vans; g — acquired by Chevron; NA — not available

[illegible]	Trucks & Tractors	Cars & Station Wagons	[illegible]	Buses	Total Vehicles
US Postal Service	120,404	12,030	0	10	132,444
General Services Administration (a)	33,599	51,386	150	3383	88,518
Air Force	41,248	9863	1092	2268	50,439
Army	35,404	9838	1004	3014	49,260
Agriculture Department	26,907	4431	1	36	31,375
Navy	22,676	3104	606	1011	27,397
Interior Department	12,347	1871	16	235	14,469
Justice Department	2970	11,009	8	130	14,117
Department of Energy	10,395	2026	58	268	12,747
Treasury Department	1086	6624	0	14	7724
Civil Works, Corps of Engineers	6205	903	3	15	7126
Marine Corps	5165	647	0	293	6105
Tennessee Valley Authority	2554	1351	14	0	3919
State Department	1123	902	9	0	2034
Labor Department	1423	416	20	67	1926
National Aeronautics & Space Admin	959	211	14	10	1194

a — most vehicles are in Interagency Motor Pool and rented or leased to other government fleets. There is no duplication with other fleets listed; * — source: General Services Administration Report, printed 1985.

Attention Private Carriers:

Companies that operate 300 or more vehicles and wish to be considered for inclusion in CCJ's 1987 list of private fleets should mail a self-addressed envelope to: Fleet List, CCJ, Chilton Way, Radnor, Pa. 19089-0060. Your return envelope will be used to forward a questionnaire. Carriers wishing to participate in the next PTCA-sponsored study of private fleet costs should contact The Private Truck Council of America, Inc., 2022 P St., N.W., Washington, D.C. 20036. Participants will receive survey results free of charge, and a detailed summary of their operation.

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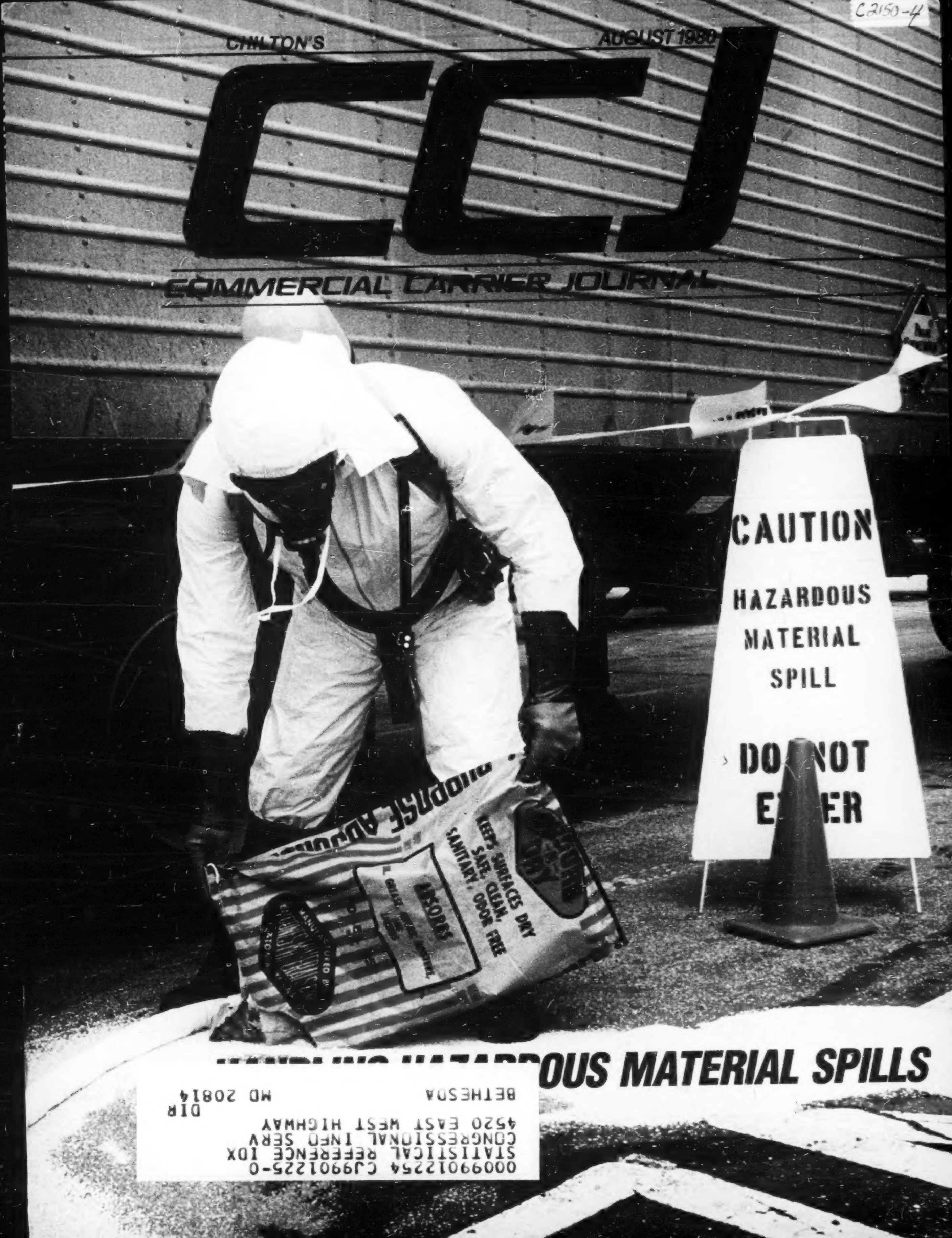
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Starting in mid-1987, some 185,000 carriers will receive a questionnaire from the Bureau of Motor Carrier Safety, asking about their safety and violation records to determine the safety fitness of owners and operators of commercial vehicles, including persons seeking new or additional operating authority as motor carriers. If a carrier fails to respond, it will be subject to fines or imprisonment. Details **16**

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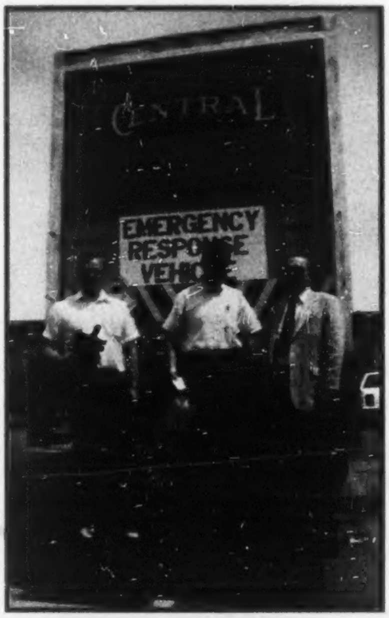

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HANDLING HAZARDOUS MATERIAL SPILLS

A do-it-yourself approach to cleaning up hazardous material spills can pay off, as illustrated in this story about Central Freight Lines' emergency response team and specially-equipped trailer. The trailer contains virtually everything required to safely contain, clean up, and transport spilled materials and leaking drums, according to Central's safety director, Henry Lewis. **54**

GLIDER KITS: A LOW COST ALTERNATIVE

When a truck is wrecked or needs a facelift, glider kits – new trucks without an engine, transmission or rear – can save 40% or more compared to major repairs or new equipment. Here's a comparative look at glider kits offered by seven truck manufacturers, the availability of gliders factory-fitted with remanufactured engine, and fleet experience with glider assembly. **58**

OIL-RELATED ENGINE FAILURES

Are you killing your engines with the wrong oil? Or with drain intervals that are too long? Oil-related damage can be difficult to recognize. But this article describes how a fleet manager can read the writing on the cylinder walls, pistons, bearings and other wearing surfaces to determine whether his PM program needs attention. **62**

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House and Senate working on highway funding bills

From CCJ's Washington Bureau

Lawmakers in both the House and Senate are pushing ahead on legislation to continue the federal aid highway program by Sept. 30, when the current program is due to end. But they are heading in different directions in several critical areas.

As a result, there could be a gap in the flow of federal money to the states to finish the Interstate system and repair existing highways.

The measure making its way through the House would authorize highway spending of $14 billion a year for five years, or a total of $70 billion, beginning this Oct. 1, but would hold actual spending to $12.6 billion to meet current budget ceilings. The Senate measure would authorize about $52 billion over four years, but would also permit money now held in the highway trust fund to be spent, reducing the current $10 billion now in the bank to about $4 billion.

Another major difference between the two bills involves how the money would be turned over to the states. Under the Senate measure, funds currently allocated to Interstate highways, four R programs (reconstruction, resurfacing, repair and rehabilitation) and primary roads would be combined and turned over to the states as "block grants" to be spent pretty much as the states choose. This approach, strongly supported by the Reagan Administration through the Department of Transportation, is not in the House bill. Transportation Secretary Elizabeth Dole has sharply criticized the House measure in this regard.

The House measure, as cleared by the Public Works Committee, would not permit federal highway funds to be used for toll roads, a plan that could be added to the Senate version.

The House bill would earmark about $1.2 billion over five years for specific projects favored by individual House members. There are more than 100 of these so-called "demonstration projects" in the bill, and they have drawn the threat of a Presidential veto if they remain in the final version of the legislation that will have to be drafted by a House-Senate conference committee.

The bills must also clear both the House Ways and Means Committee and the Senate Finance Committees where the taxes to pay for the program are expected to be continued pretty much as they now exist. □

ATA is top Congressional honoraria contributor in 1985

Lobbying Organizations Paying the Most Honoraria to House and Senate Members

	1985 PAYMENTS	CHANGE FROM 1984 (in percent)
American Trucking Associations	$97,500	+3,150%
Chicago Board of Trade/ Chicago Mercantile Exchange	89,000	+40
National Association of Broadcasters	75,500	+24
American Bankers Association	74,750	+79
Tobacco Institute	74,000	−43
Grocery Manufacturers Association	64,000	+23
PaineWebber Inc.	64,000	+363
Connell Rice & Sugar	60,000	+30
National Cable Television Association	58,000	−16
Waste Management Inc.	57,500	+125
Distilled Spirits Council	55,701	+157
Securities Industry Association	52,000	+8
General Electric Co.	47,500	+23
United Technologies Corp.	46,150	+17
Outdoor Advertising Association	45,164	−27

Source: Common Cause

Philadelphia, Pa.—A study of Congressional honoraria by Common Cause found that American Trucking Associations, in 1985, was the biggest contributor of honoraria payments to members of Congress.

Common Cause says ATA gave $97,500, most of it paid to members of Congress who attended breakfast meetings with ATA lobbyist Jerald Halvorsen at ATAs' Capitol Hill office.

Fees of usually $1,000 were paid to 47 House members, while 24 Senators got $2,000. Common Cause says honoraria payments to Congressional members from all sources totaled $7,156,004, a 32% increase over 1984.

"Special interest groups seeking to gain access and influence on Capitol Hill obviously must think it pays them to give ever-increasing amounts of honoraria to members of Congress," Common Cause president Fred Wertheimer said. "But the real cost of their excessive honoraria payments...is further damage to our representative democracy, already under siege by the dominating role of special interest political action committee [PAC] money." □